# EHM Episode

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## Related Documents:

| Document Title | Document Link | Reference Number | Version | Author(s) |
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# EHM Episode

This document outlines how to record and manage an **EHM Episode** for a child/young person in EHM (version 10)

The EHM Episode consists of the following stages:

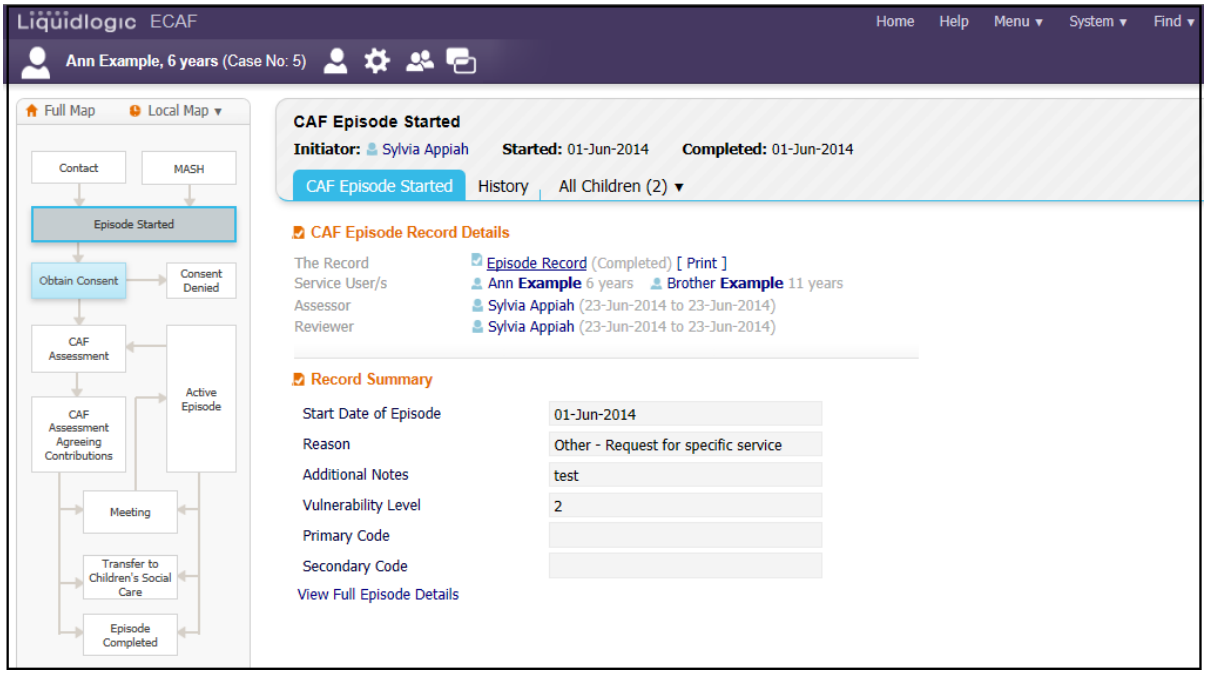
- Starting a New EHM Episode
- Obtaining Consent
- Conducting CAF Assessments
- Agreeing Contributions
- Recording Meetings
- Re-starting a CAF Assessment
- Transferring a case to ics (if applicable)
- Completing an EHM Episode

## *Accessing Current and Previous EHM Episodes*

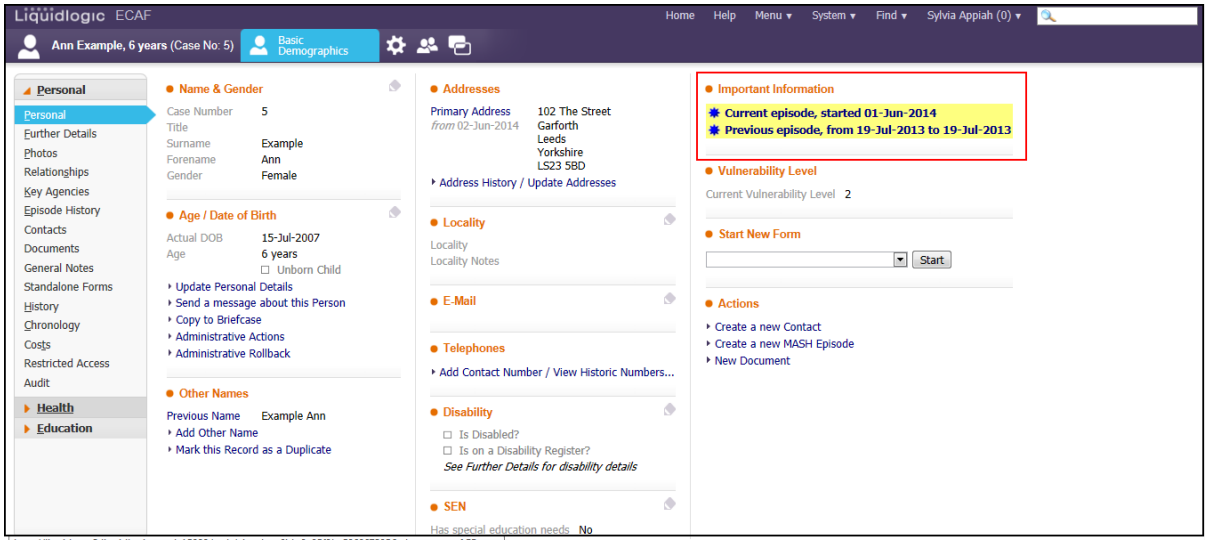
All EHM Episodes can be accessed from the child/young persons **Demographics Record**. The Important information section of the demographics will display current and/or previous **Episode History** tab will list both previous and current EHM Episodes recorded on EHM.

1. Select the **Current Episode** or **Previous Episode** link within the Personal Tab to navigate to the Episode Pathway

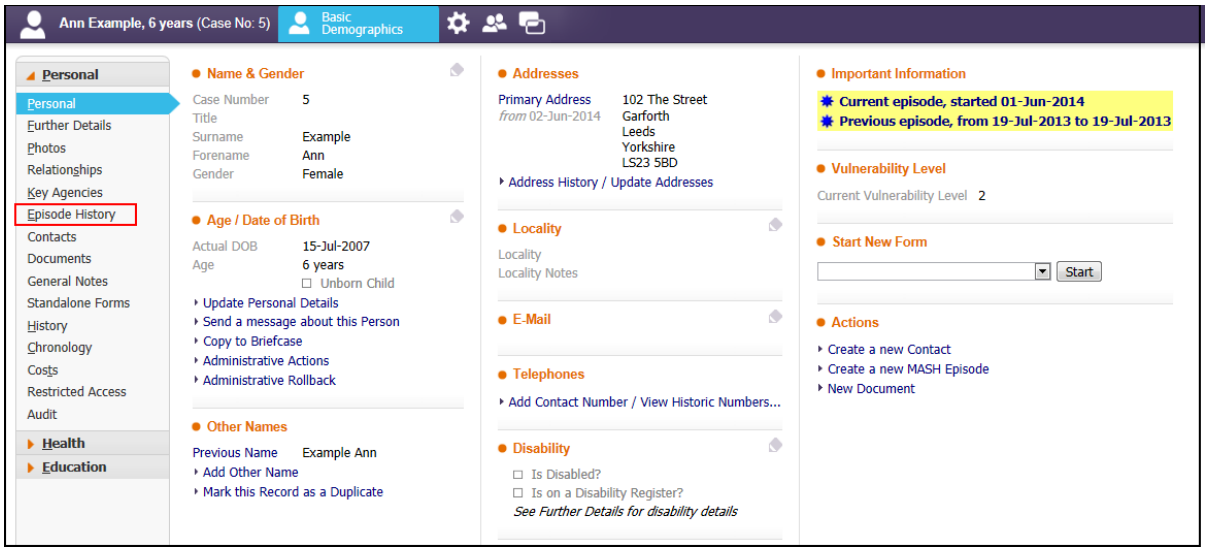
**TIP**: Click will also display the Episode Pathway



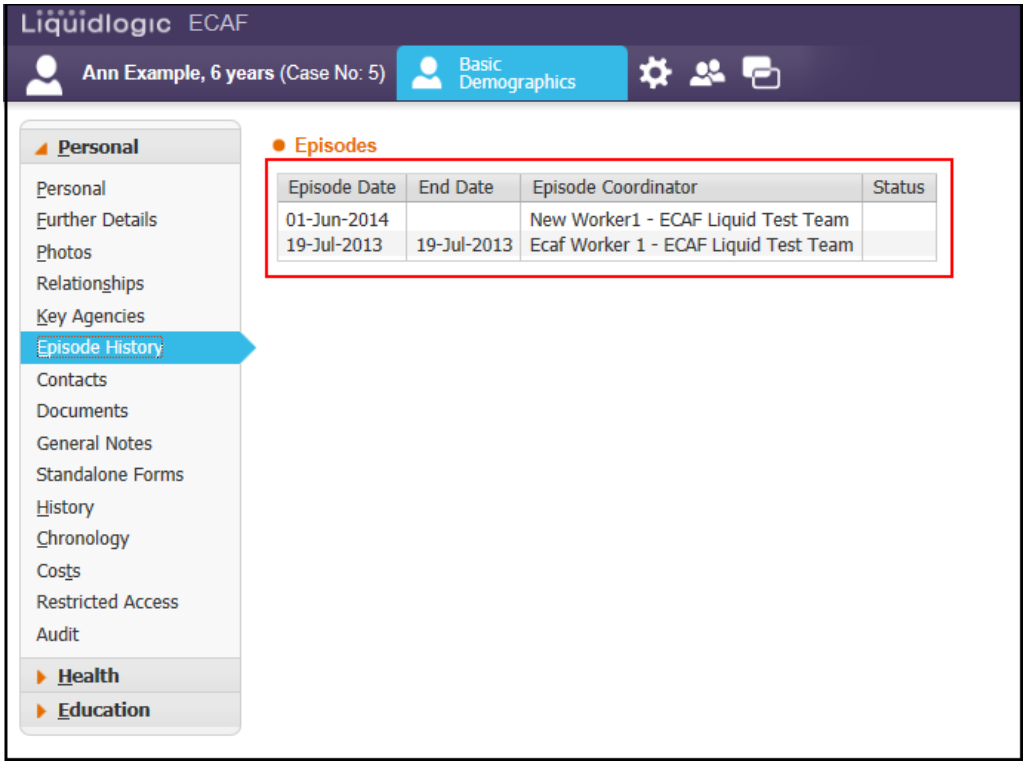
The following example shows a child with a previous EHM episode:

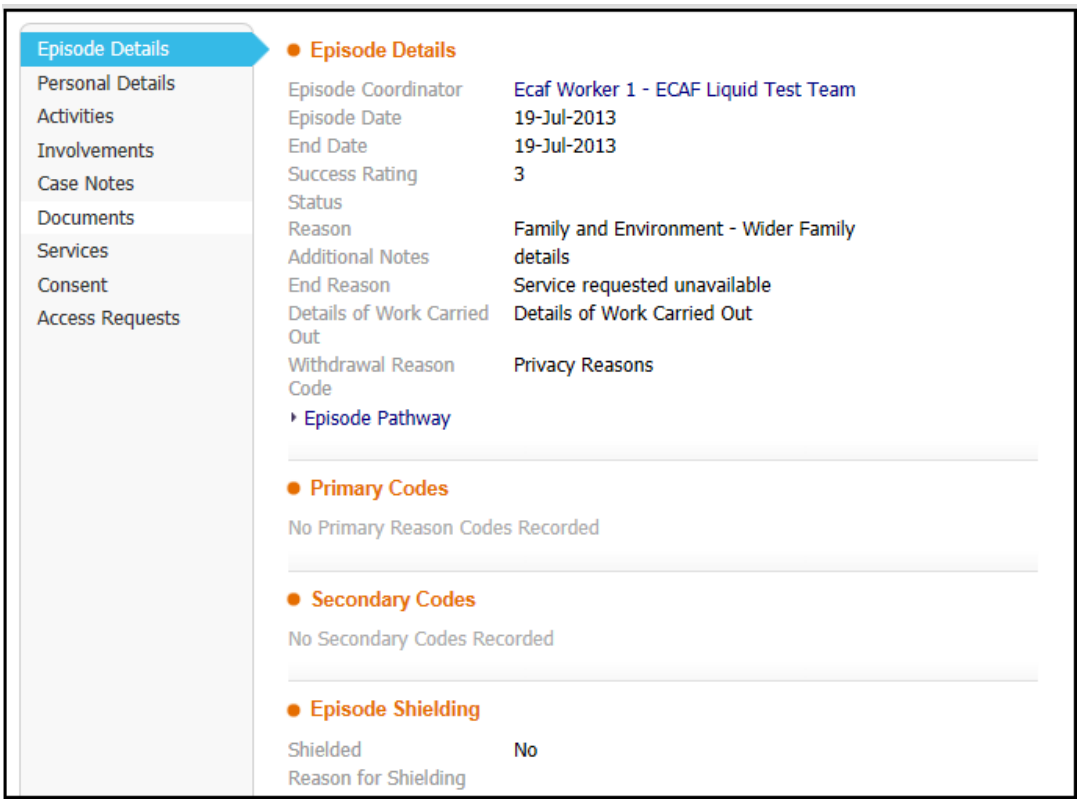



The **Episode History** Tab will display both current and previous EHM Episodes. This tab will only be displayed once an EHM Episode has been created



1. Select an **EHM episode** from the Episode History tab to drill down to the **Episode Details** tabs. Click on the relevant Episode link to access the **Episode details**



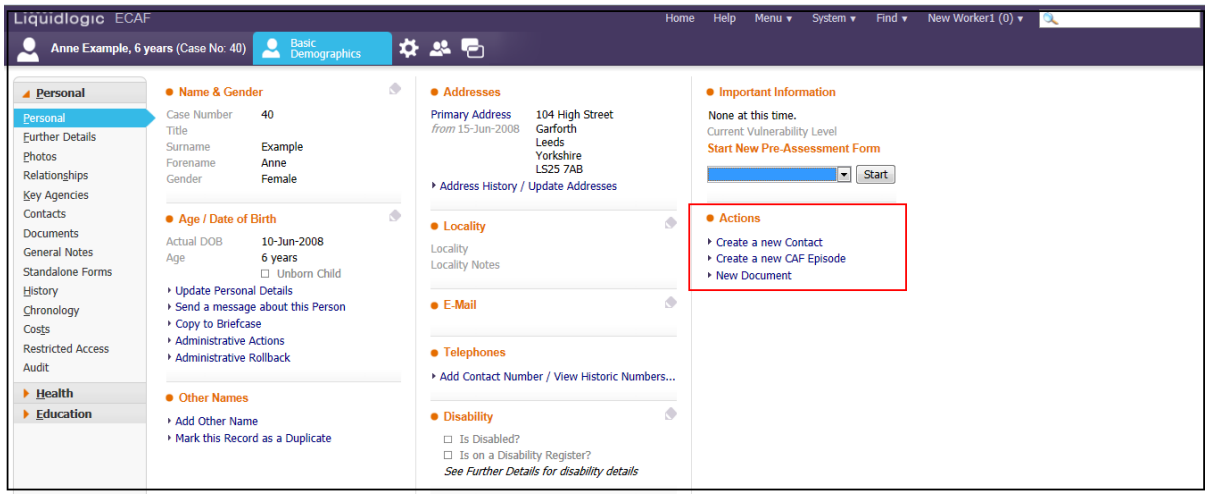




**TIP**: the **Access Requests** tab will only be visible to users with full access to the record.

## *Starting a New EHM Episode*

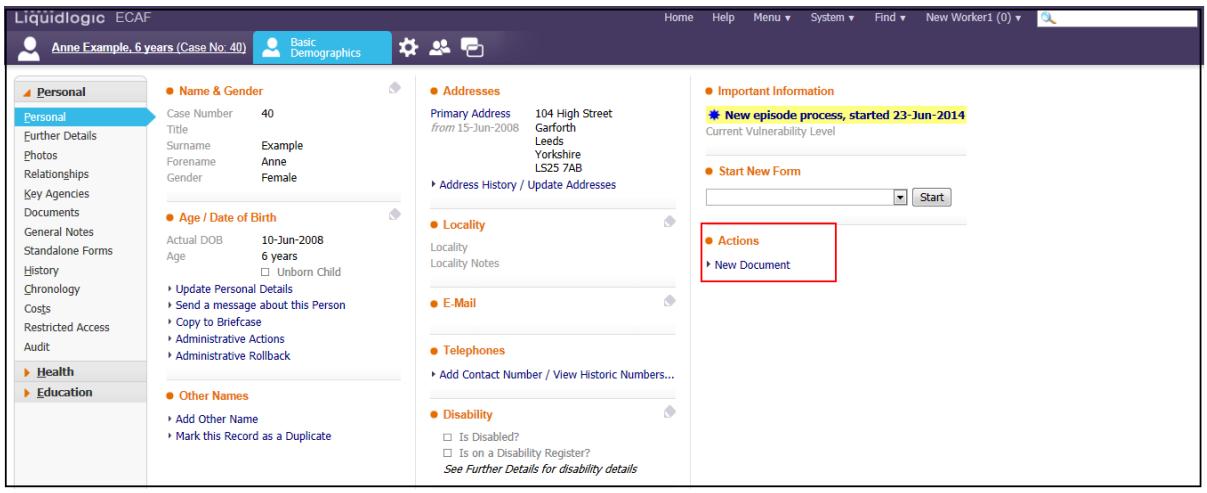
A New EHM Episode can be started from the child/young person's demographics record.

1. From the Personal tab, click **Create a New EHM Episode**

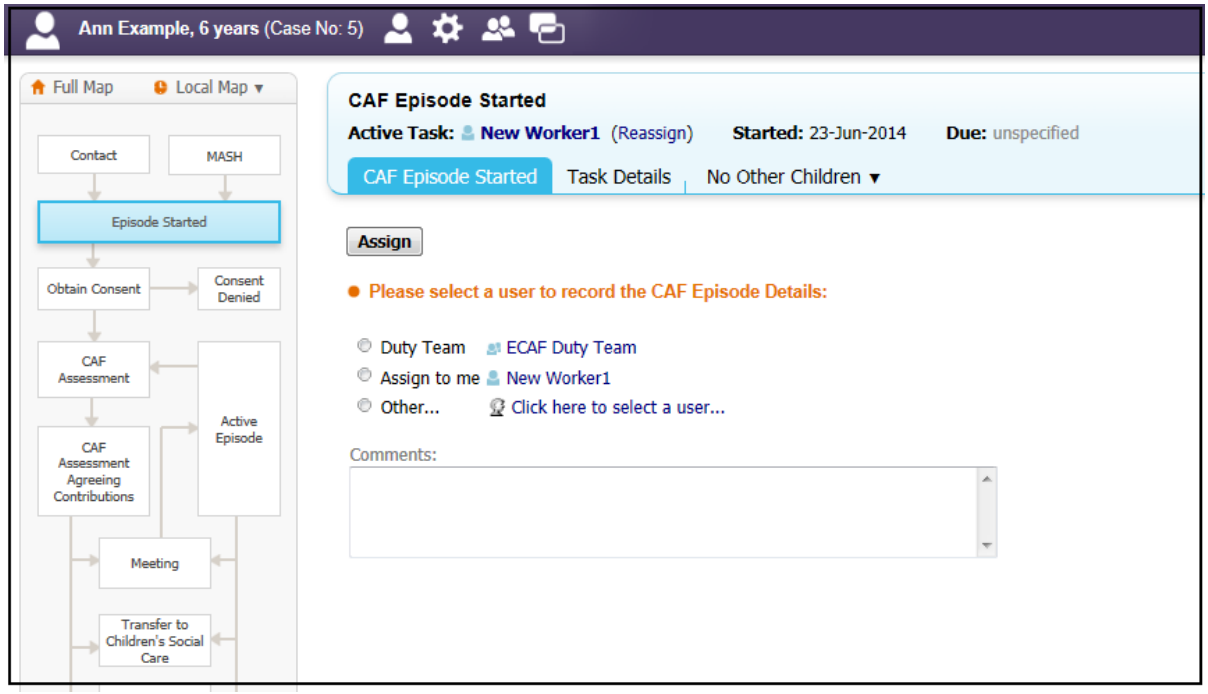



**NOTE**: If the record does not exist on EHM then a new person record will need to be created. For further guidance on creating new person records refer to the **EHM Demographics** User Manual.

If a current EHM Episode exists the link to create a New EHM Episode will not be available.

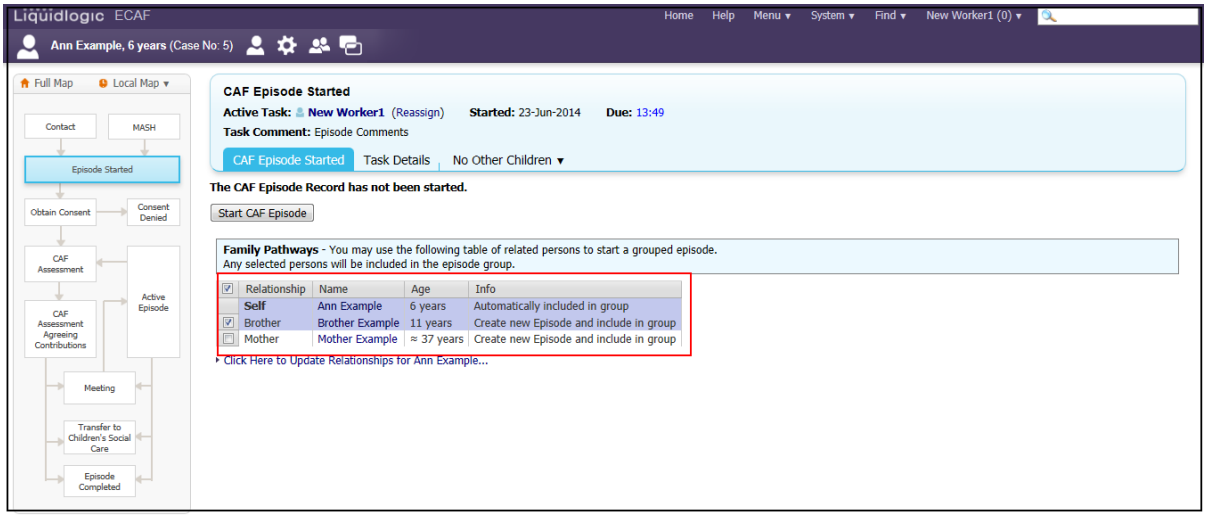


The Start a New Episode screen will be displayed.

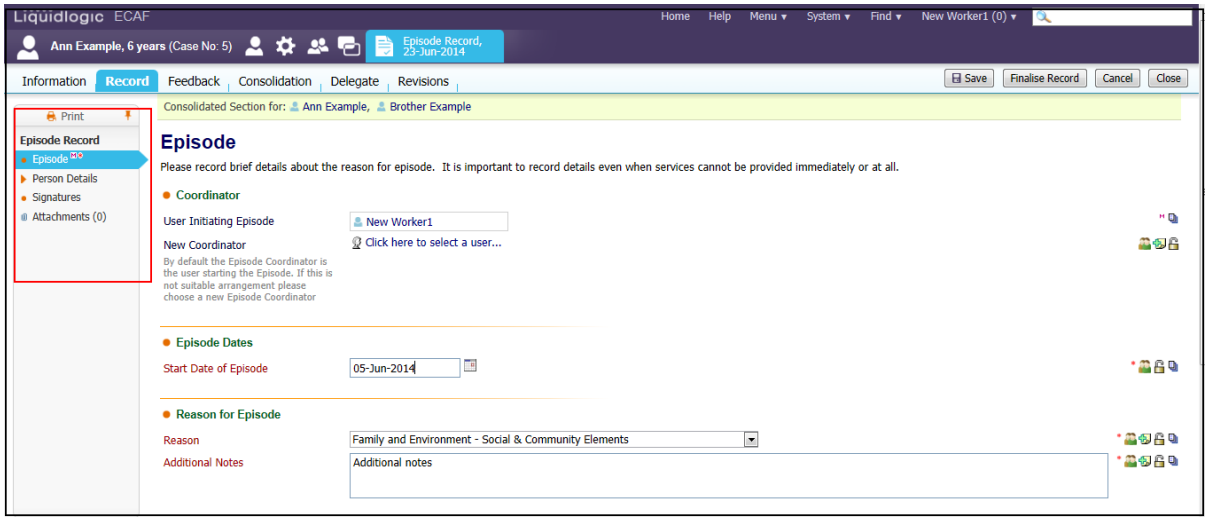



1. Select the user to record the EHM Episode
2. he **Episode Coordinator** defaults to the user starting the new EHM Episode
3. The **Episode Date** will default to the current date/time and should be amended if required
4. Enter any **Comments** as required
5. Click **Assign**

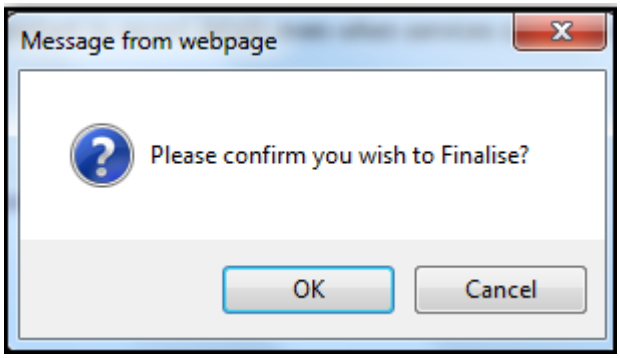
**Note: If there are other family members set in relationships, they will be automatically included in the Start CAF Episode stage. The remove any family member for the process, uncheck the tick box of the family member**



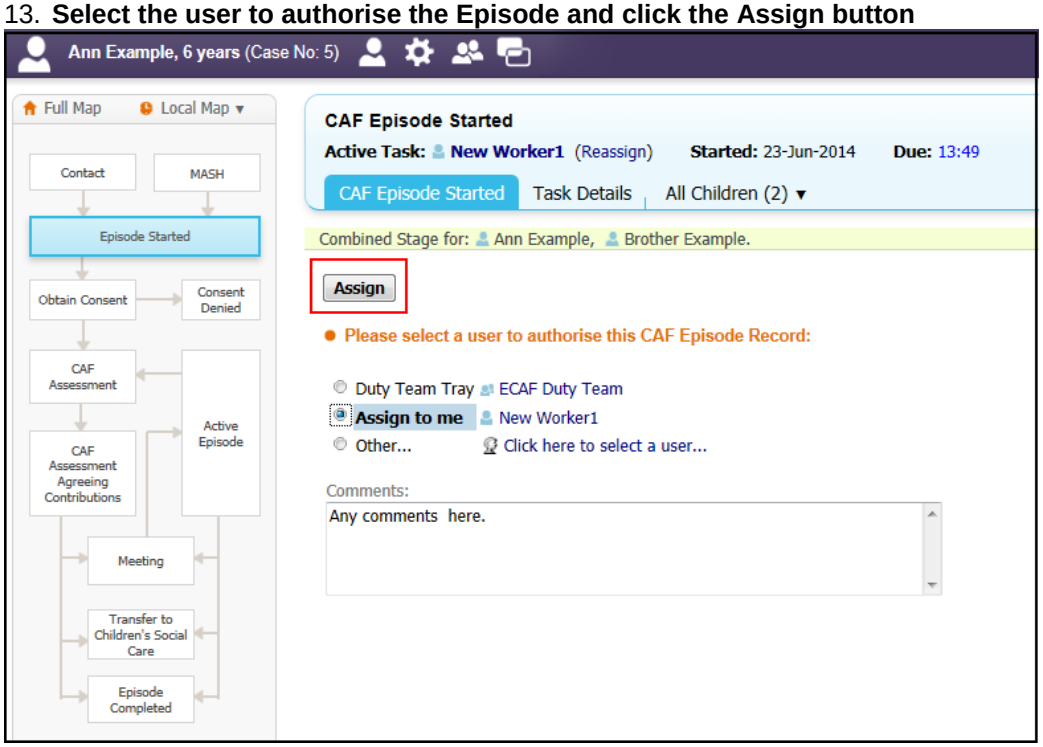

6. Click on Start CAF Episode
7. Enter the date of the Episode
8. Enter Reason
9. Enter additional notes
10. Complete the rest to Episode record by moving between the sections of the forms.


Liquidlogic ECAF
Home Help Menu System Find New Worker1 (0)
Ann Example, 6 years (Case No: 5)
Episode Record, 23-Jun-2014
Information Record Feedback Consolidation Delegate Revisions
Save Finalise Record Cancel Close
Print
Episode Record
Episode
Person Details
Signatures
Attachments (0)
Consolidated Section for: Ann Example, Brother Example
Episode
Please record brief details about the reason for episode. It is important to record details even when services cannot be provided immediately or at all.
Coordinator
User Initiating Episode
New Worker1
New Coordinator
Click here to select a user...
By default the Episode Coordinator is the user starting the Episode. If this is not suitable arrangement please choose a new Episode Coordinator
Episode Dates
Start Date of Episode
05-Jun-2014
Reason for Episode
Reason
Family and Environment - Social & Community Elements
Additional Notes
Additional notes

11. Click on **Finalise** to complete the Episode record
12. Click **Ok** to confirm you wish to finalise or cancel if you do **not wish to do so.**

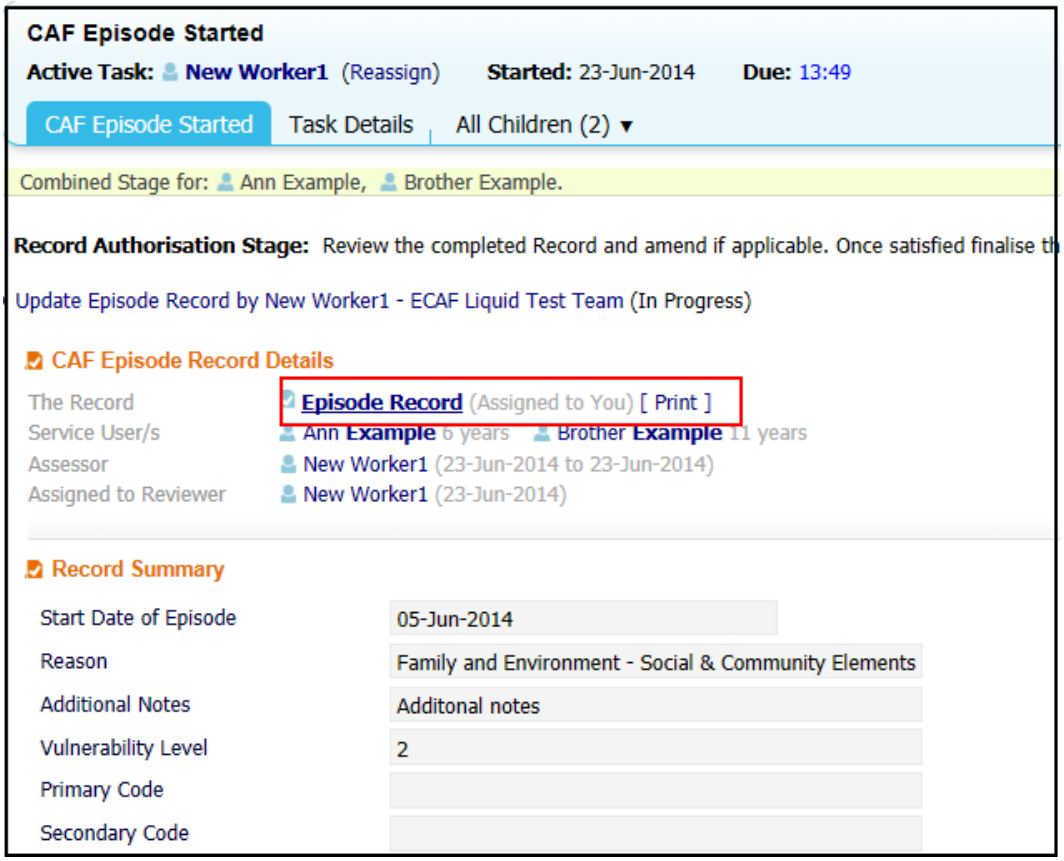



13. **Select the user to authorise the Episode and click the Assign button**

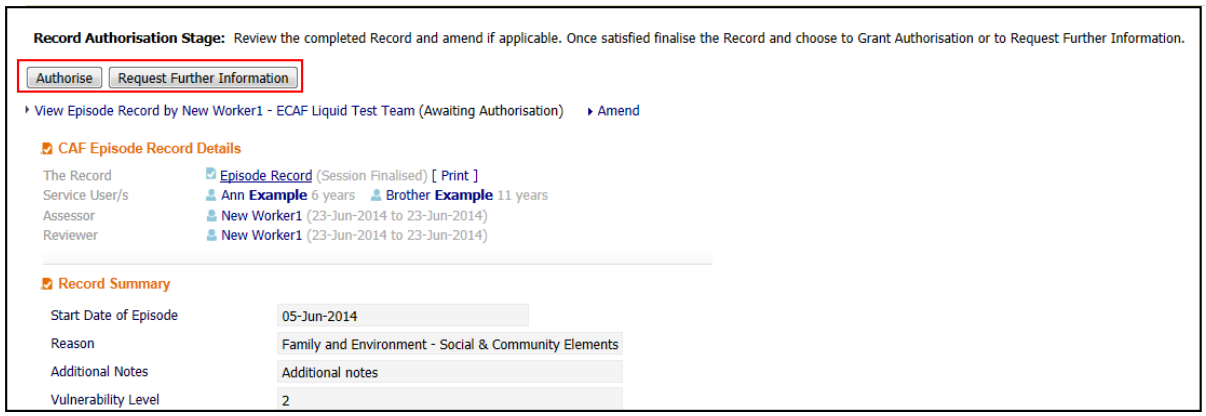



14. Click **Ok** if you wish to finalise or cancel if you do not wish to do so.
A task will be generated into the authorising manager or user's work tray

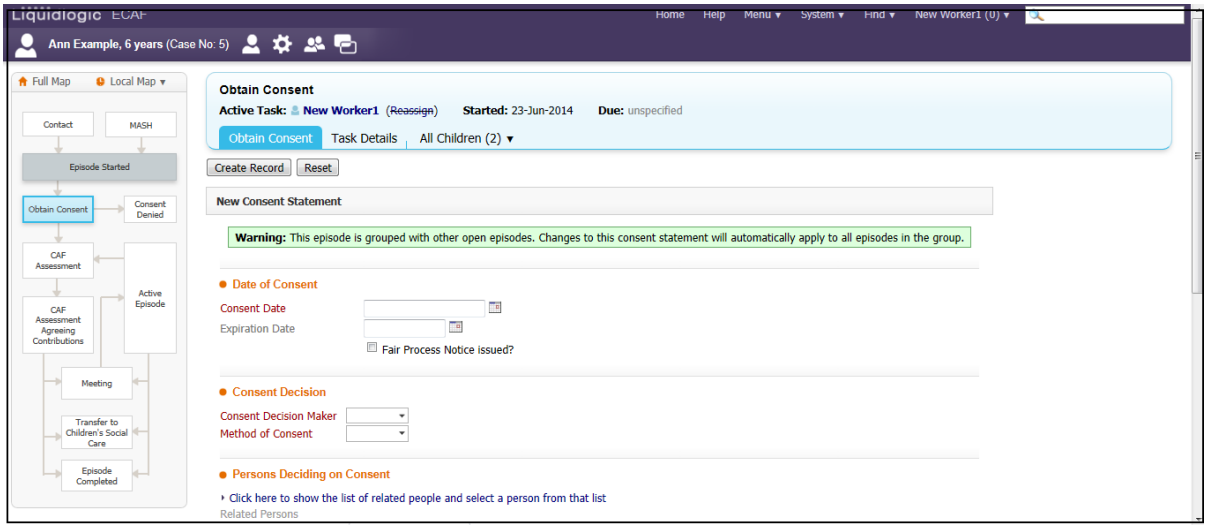
15. Click on the task link from the worktray
16. Click on **the Episode Record** link to open in edit mode


CAF Episode Started
Active Task: New Worker1 (Reassign) Started: 23-Jun-2014 Due: 13:49
CAF Episode Started
Task Details
All Children (2)
Combined Stage for: Ann Example, Brother Example.
Record Authorisation Stage: Review the completed Record and amend if applicable. Once satisfied finalise th
Update Episode Record by New Worker1 - ECAF Liquid Test Team (In Progress)
CAF Episode Record Details
The Record
Episode Record (Assigned to You) [ Print ]
Service User/s
Ann Example 6 years
Brother Example 11 years
Assessor
New Worker1 (23-Jun-2014 to 23-Jun-2014)
Assigned to Reviewer
New Worker1 (23-Jun-2014)
Record Summary
Start Date of Episode
05-Jun-2014
Reason
Family and Environment - Social & Community Elements
Additional Notes
Additonal notes
Vulnerability Level
2
Primary Code
Secondary Code

17. Review the Episode and Click finalise.
18. Click **Ok** to confirm
19. Click **Authorise**


Record Authorisation Stage: Review the completed Record and amend if applicable. Once satisfied finalise the Record and choose to Grant Authorisation or to Request Further Information.
Authorise
Request Further Information
View Episode Record by New Worker1 - ECAF Liquid Test Team (Awaiting Authorisation)
Amend
CAF Episode Record Details
The Record
Episode Record (Session Finalised) [ Print ]
Service User/s
Ann Example 6 years
Brother Example 11 years
Assessor
New Worker1 (23-Jun-2014 to 23-Jun-2014)
Reviewer
New Worker1 (23-Jun-2014 to 23-Jun-2014)
Record Summary
Start Date of Episode
05-Jun-2014
Reason
Family and Environment - Social & Community Elements
Additional Notes
Additional notes
Vulnerability Level
2

Once authorised the new EHM Episode will be created, and the Obtain Consent stage displayed. Please refer to the following **Obtain Consent** section for further details.

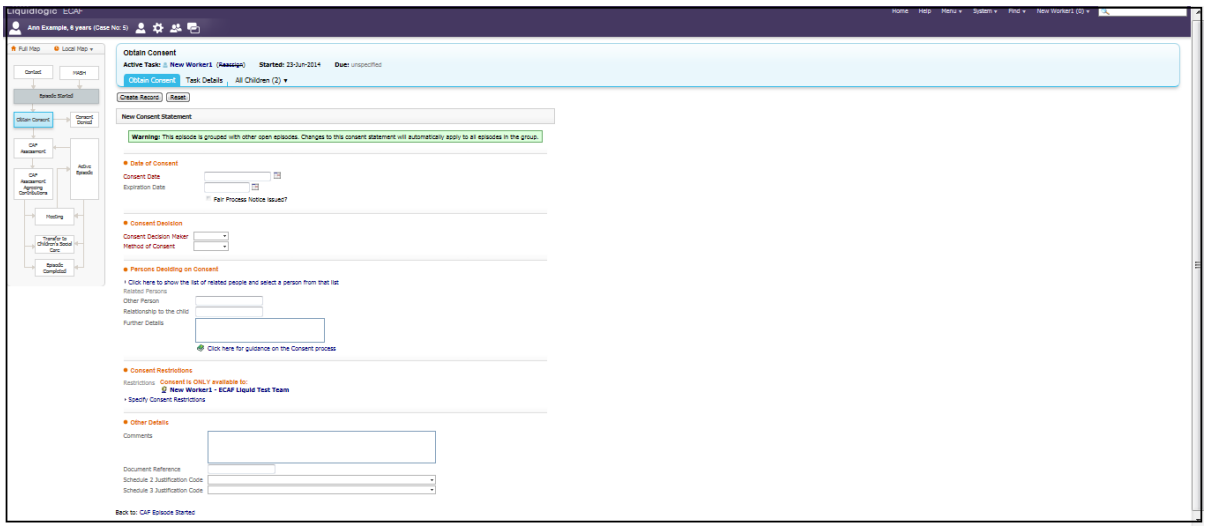

Liquidlogic ECAF
Home
Help
Menu
System
Find
New Worker1 (U)
Ann Example, 6 years (Case No: 5)
Full Map
Local Map
Contact
MASH
Episode Started
Obtain Consent
Consent Denied
CAF Assessment
Active Episode
CAF Assessment Agreeing Contributions
Meeting
Transfer to Children's Social Care
Episode Completed
Obtain Consent
Active Task: New Worker1 (Reassign)
Started: 23-Jun-2014
Due: unspecified
Obtain Consent
Task Details
All Children (2)
Create Record
Reset
New Consent Statement
Warning: This episode is grouped with other open episodes. Changes to this consent statement will automatically apply to all episodes in the group.
Date of Consent
Consent Date
Expiration Date
Fair Process Notice issued?
Consent Decision
Consent Decision Maker
Method of Consent
Persons Deciding on Consent
Click here to show the list of related people and select a person from that list
Related Persons

## *Obtain Consent*

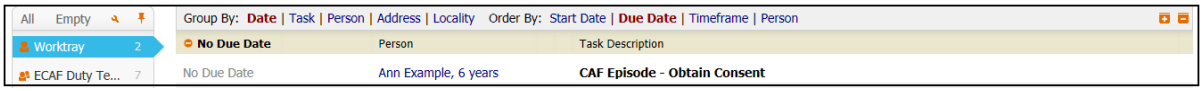
Consent must be granted in order to give users the ability to start a new EHM Episode and record a contribution to an EHM assessment on  EHM.

### New Consent Statement

Once a new EHM episode is created the Episode Co-ordinator will automatically be prompted to obtain consent and the following screen will be displayed:

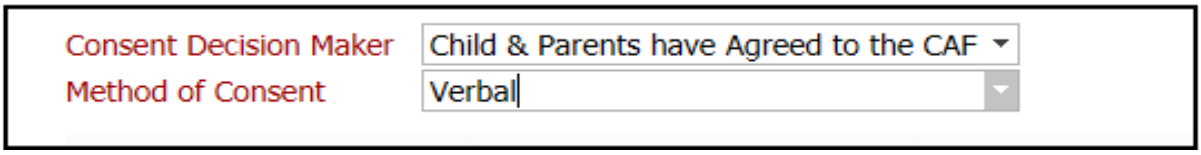


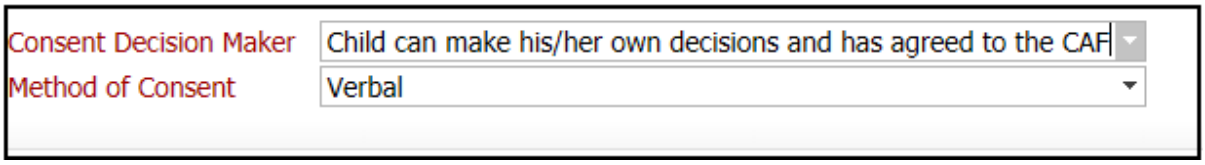

**TIP**: Select the **Obtain Consent** task from the work tray to record the new consent details.

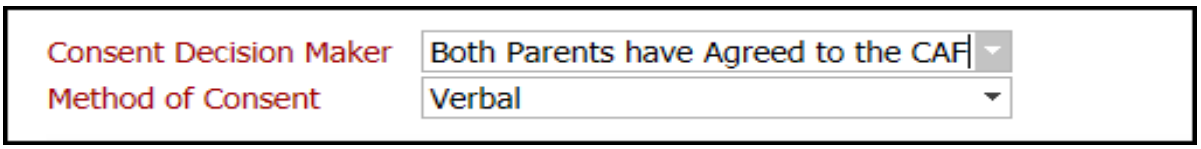

All
Empty
Group By: Date | Task | Person | Address | Locality
Order By: Start Date | Due Date | Timeframe | Person
Worktray 2
ECAF Duty Te... 7
No Due Date
Person
Task Description
No Due Date
Ann Example, 6 years
CAF Episode - Obtain Consent

1. Enter **Date** Consent was given, should an expiration date be known this can also be entered and tick box if Fair Process Notice had been issued.
2. Answer the questions under the **Persons Giving Consent** area

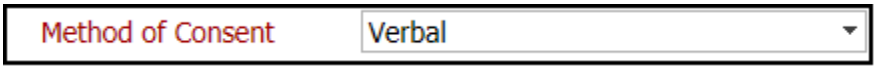
For example the following 3 responses will allow the user to continue to the CAF assessment stage:



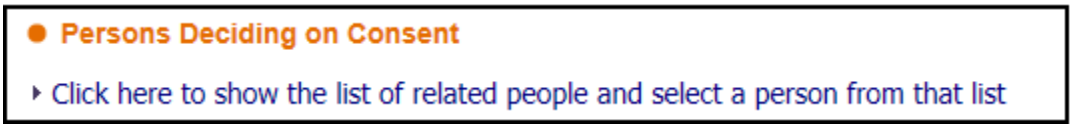




3. Specify  the **Method of Consent** as Verbal or Written from the picklist

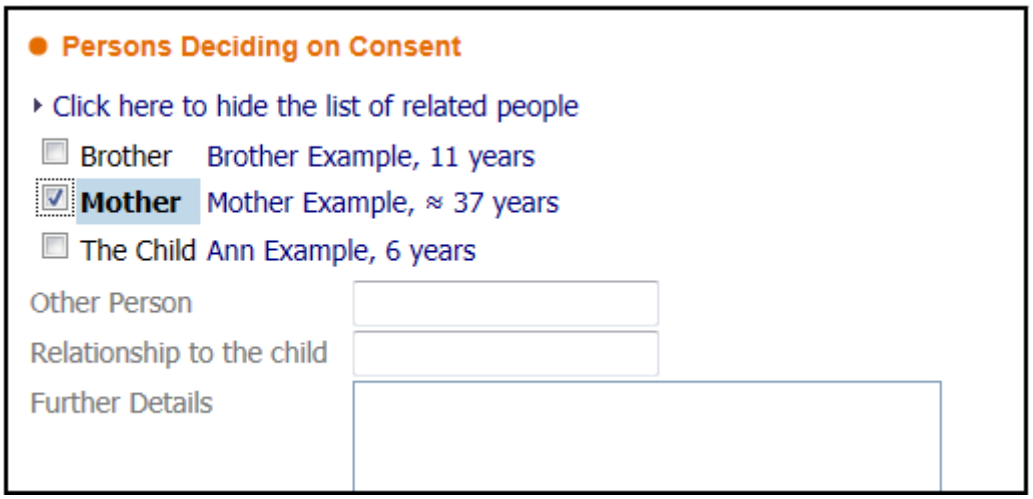


**NOTE**: If 'Verbal' is selected the 'must obtain written consent' alert can be generated, and a task will be displayed in the worktray. The 'Written Consent' alert is dependent on your Local Authority bespoke customer EHM configuration. Please consult your Liquidlogic project manager for details.

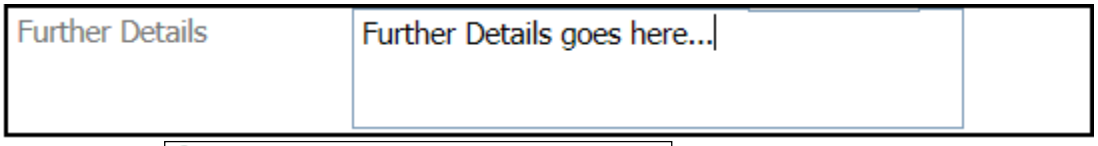
2. Select the **Click here to show the list of related people…** link to specify a relation recorded within EHM as the person granting consent

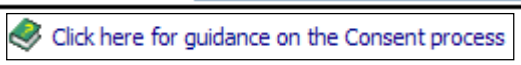



A list of recorded relationships for the child/young person will be displayed. Select the radio button for the relation granting consent, if preferred:

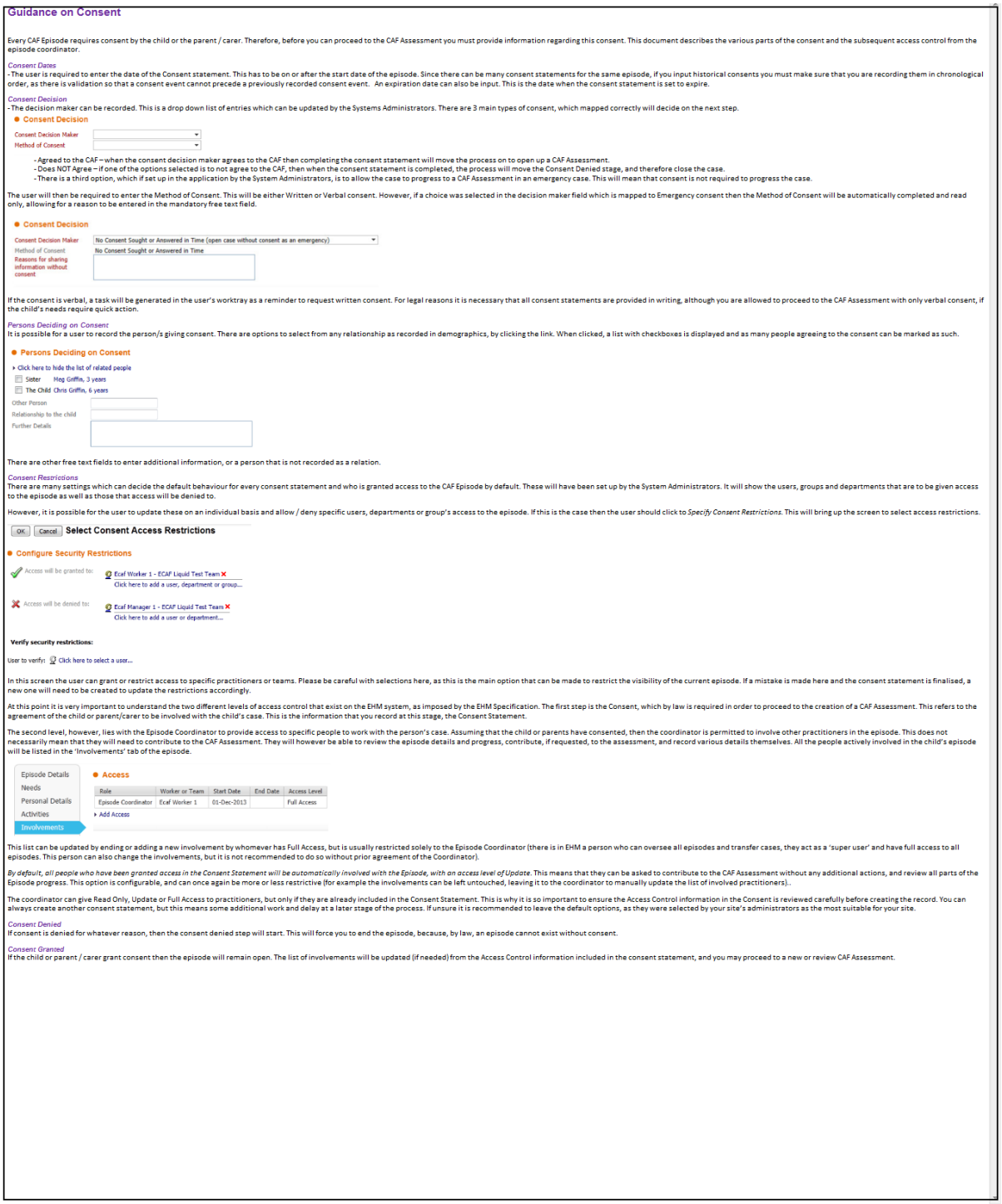

Persons Deciding on Consent
Click here to hide the list of related people
Brother Brother Example, 11 years
Mother Mother Example, ≈ 37 years
The Child Ann Example, 6 years
Other Person
Relationship to the child
Further Details

4. Enter any **Further Details** which are significant to the consent being given




**TIP**: Select the 

link for help regarding the consent process. Click the **Back button** on the Internet Explorer toolbar to return from the Consent Guidance to the Obtain Consent screen.



## Guidance on Consent

Every CAF Episode requires consent by the child or the parent / carer. Therefore, before you can proceed to the CAF Assessment you must provide information regarding this consent. This document describes the various parts of the consent and the subsequent access control from the episode coordinator.

*Consent Dates*
- The user is required to enter the date of the Consent statement. This has to be on or after the start date of the episode. Since there can be many consent statements for the same episode, if you input historical consents you must make sure that you are recording them in chronological order, as there is validation so that a consent event cannot precede a previously recorded consent event. An expiration date can also be input. This is the date when the consent statement is set to expire.

*Consent Decision*
- The decision maker can be recorded. This is a drop down list of entries which can be updated by the Systems Administrators. There are 3 main types of consent, which mapped correctly will decide on the next step.

**Consent Decision**

Consent Decision Maker
Method of Consent

- Agreed to the CAF – when the consent decision maker agrees to the CAF then completing the consent statement will move the process on to open up a CAF Assessment.
- Does NOT Agree – if one of the options selected is to not agree to the CAF, then when the consent statement is completed, the process will move the Consent Denied stage, and therefore close the case.
- There is a third option, which if set up in the application by the System Administrators, is to allow the case to progress to a CAF Assessment in an emergency case. This will mean that consent is not required to progress the case.

The user will then be required to enter the Method of Consent. This will be either Written or Verbal consent. However, if a choice was selected in the decision maker field which is mapped to Emergency consent then the Method of Consent will be automatically completed and read only, allowing for a reason to be entered in the mandatory free text field.

**Consent Decision**

Consent Decision Maker: No Consent Sought or Answered in Time (open case without consent as an emergency)
Method of Consent: No Consent Sought or Answered in Time
Reasons for sharing information without consent

If the consent is verbal, a task will be generated in the user's worktray as a reminder to request written consent. For legal reasons it is necessary that all consent statements are provided in writing, although you are allowed to proceed to the CAF Assessment with only verbal consent, if the child's needs require quick action.

*Persons Deciding on Consent*
It is possible for a user to record the person/s giving consent. There are options to select from any relationship as recorded in demographics, by clicking the link. When clicked, a list with checkboxes is displayed and as many people agreeing to the consent can be marked as such.

**Persons Deciding on Consent**

Click here to hide the list of related people
Sister Meg Griffin, 3 years
The Child Chris Griffin, 6 years
Other Person
Relationship to the child
Further Details

There are other free text fields to enter additional information, or a person that is not recorded as a relation.

*Consent Restrictions*
There are many settings which can decide the default behaviour for every consent statement and who is granted access to the CAF Episode by default. These will have been set up by the System Administrators. It will show the users, groups and departments that are to be given access to the episode as well as those that access will be denied to.

However, it is possible for the user to update these on an individual basis and allow / deny specific users, departments or group's access to the episode. If this is the case then the user should click to *Specify Consent Restrictions*. This will bring up the screen to select access restrictions.

OK Cancel **Select Consent Access Restrictions**

**Configure Security Restrictions**

Access will be granted to: Ecaf Worker 1 - ECAF Liquid Test Team
Click here to add a user, department or group...
Access will be denied to: Ecaf Manager 1 - ECAF Liquid Test Team
Click here to add a user or department...

**Verify security restrictions:**

User to verify: Click here to select a user...

In this screen the user can grant or restrict access to specific practitioners or teams. Please be careful with selections here, as this is the main option that can be made to restrict the visibility of the current episode. If a mistake is made here and the consent statement is finalised, a new one will need to be created to update the restrictions accordingly.

At this point it is very important to understand the two different levels of access control that exist on the EHM system, as imposed by the EHM Specification. The first step is the Consent, which by law is required in order to proceed to the creation of a CAF Assessment. This refers to the agreement of the child or parent/carer to be involved with the child's case. This is the information that you record at this stage, the Consent Statement.

The second level, however, lies with the Episode Coordinator to provide access to specific people to work with the person's case. Assuming that the child or parents have consented, then the coordinator is permitted to involve other practitioners in the episode. This does not necessarily mean that they will need to contribute to the CAF Assessment. They will however be able to review the episode details and progress, contribute, if requested, to the assessment, and record various details themselves. All the people actively involved in the child's episode will be listed in the 'Involvements' tab of the episode.

Episode Details
Needs
Personal Details
Activities
Involvements

**Access**

| Role | Worker or Team | Start Date | End Date | Access Level |
|---|---|---|---|---|
| Episode Coordinator | Ecaf Worker 1 | 01-Dec-2013 | | Full Access |

Add Access

This list can be updated by ending or adding a new involvement by whomever has Full Access, but is usually restricted solely to the Episode Coordinator (there is in EHM a person who can oversee all episodes and transfer cases, they act as a 'super user' and have full access to all episodes. This person can also change the involvements, but it is not recommended to do so without prior agreement of the Coordinator).

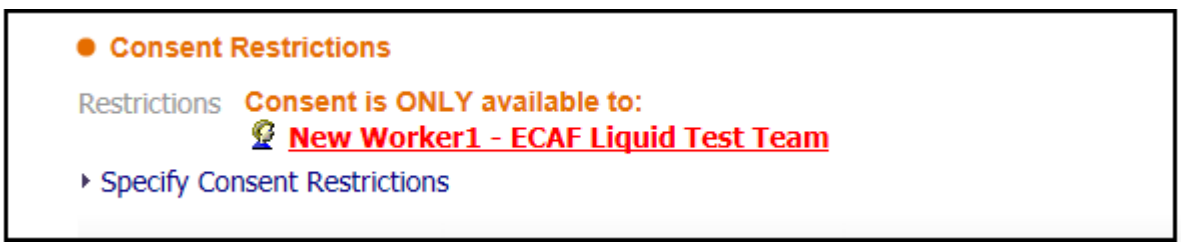
*By default, all people who have been granted access in the Consent Statement will be automatically involved with the Episode, with an access level of Update*. This means that they can be asked to contribute to the CAF Assessment without any additional actions, and review all parts of the Episode progress. This option is configurable, and can once again be more or less restrictive (for example the involvements can be left untouched, leaving it to the coordinator to manually update the list of involved practitioners)..

The coordinator can give Read Only, Update or Full Access to practitioners, but only if they are already included in the Consent Statement. This is why it is so important to ensure the Access Control information in the Consent is reviewed carefully before creating the record. You can always create another consent statement, but this means some additional work and delay at a later stage of the process. If unsure it is recommended to leave the default options, as they were selected by your site's administrators as the most suitable for your site.

*Consent Denied*
If consent is denied for whatever reason, then the consent denied step will start. This will force you to end the episode, because, by law, an episode cannot exist without consent.

*Consent Granted*
If the child or parent / carer grant consent then the episode will remain open. The list of involvements will be updated (if needed) from the Access Control information included in the consent statement, and you may proceed to a new or review CAF Assessment.

The **Consent Restrictions** section allows a user to specify who can and cannot access the child/young person's EHM Episode on EHM. By default, access to the episode is only available to the episode coordinator but can be updated, as required.

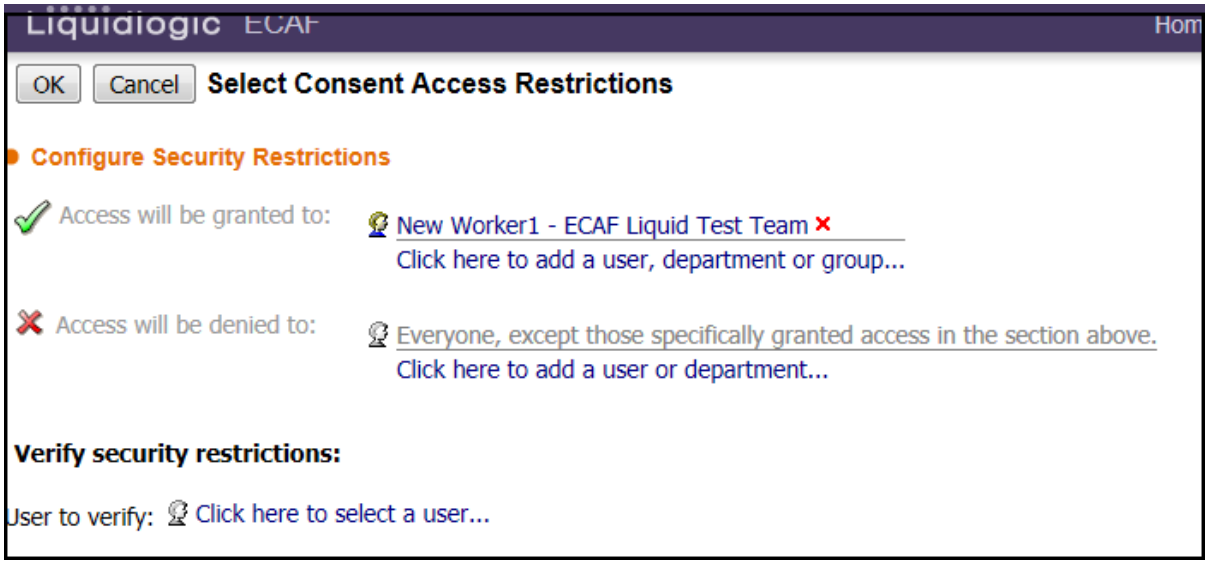


## Specifying Access and Restrictions

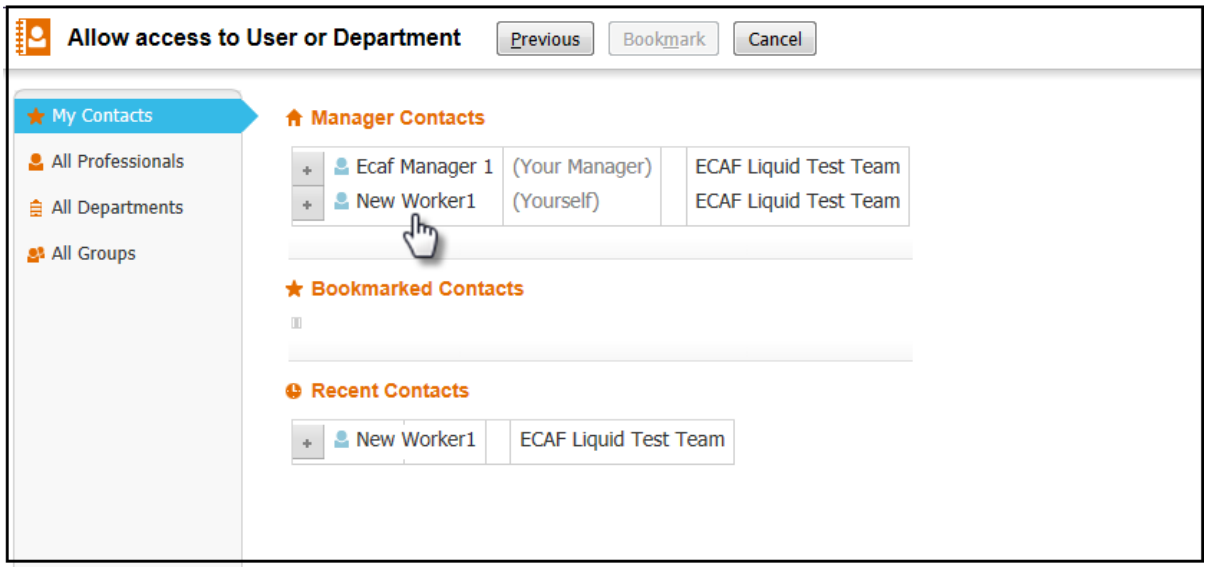
1. Click **Specify Consent Restrictions**

The following screen enables access to be specifically granted or denied to a user, department or group. By default, access is only granted to the Episode Co-ordinator and denied to everyone else, except those specifically granted access.

2. To allow or deny access to an individual user, group or users or department click on **Click here to add a user or department** next to the **Access will be granted to:** or **Access will be denied to:** question, as required


Liquidlogic ECAF
Hom
OK
Cancel
Select Consent Access Restrictions
Configure Security Restrictions
Access will be granted to:
New Worker1 - ECAF Liquid Test Team
Click here to add a user, department or group...
Access will be denied to:
Everyone, except those specifically granted access in the section above.
Click here to add a user or department...
Verify security restrictions:
User to verify:
Click here to select a user...

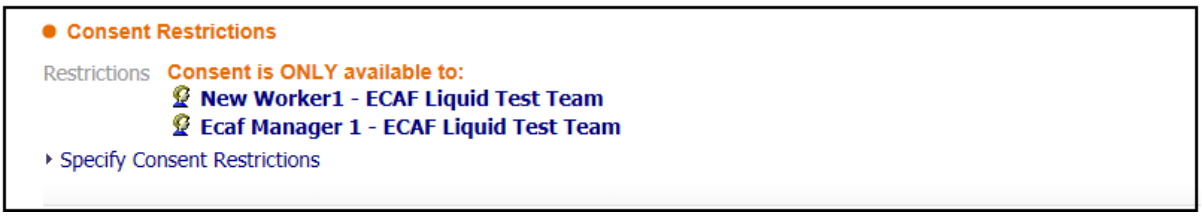
The Address Book will be displayed, enabling the user to browse and select the required user/department/group that should be granted/denied access. For further guidance on using the Address Book, please refer to the **EHM General** User Manual.



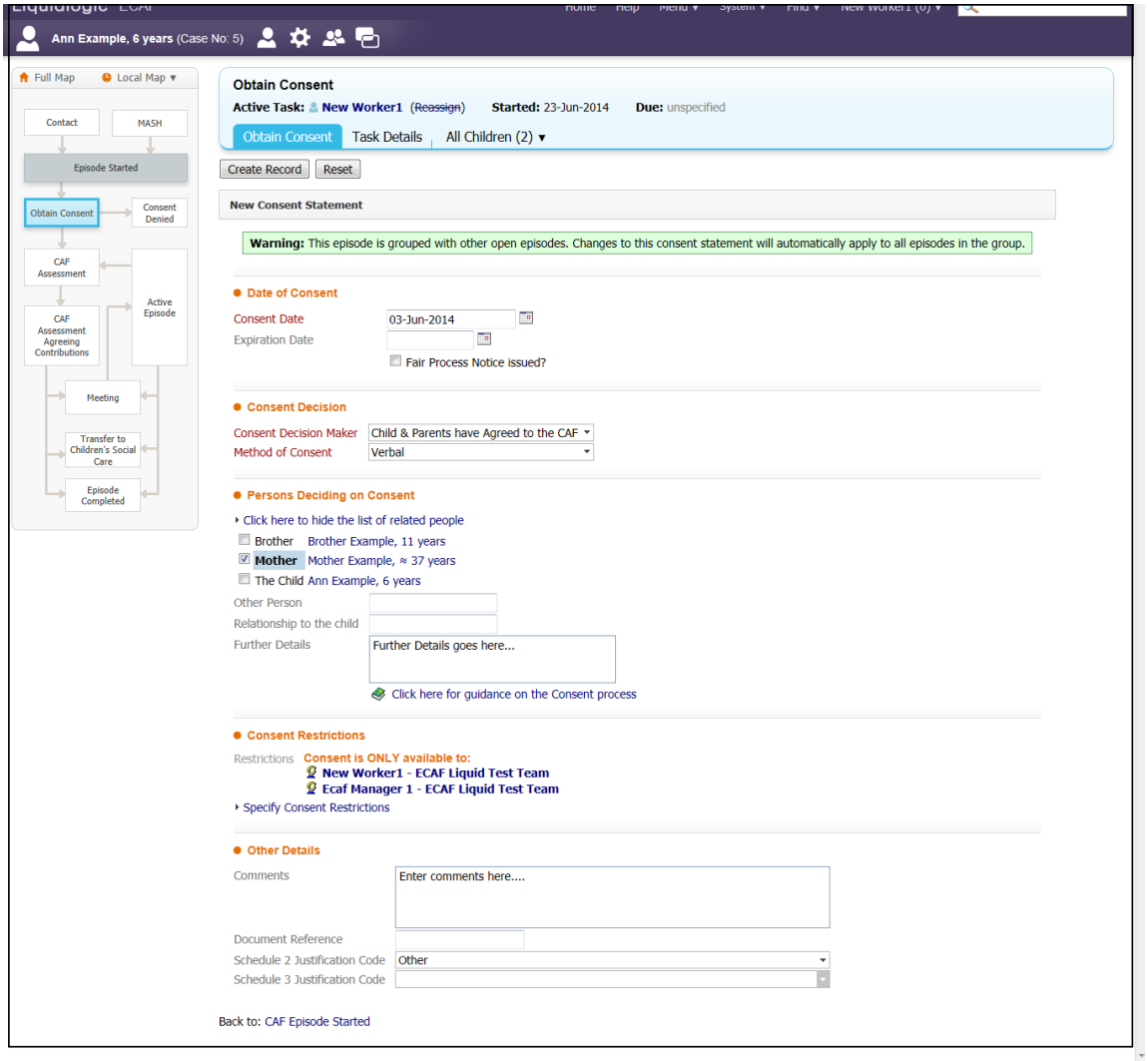
5. Once the required user/group/department has been selected, click **OK – Restrict Access**

OK
Cancel
Select Consent Access Restrictions
Configure Security Restrictions
Access will be granted to:
New Worker1 - ECAF Liquid Test Team
Ecaf Manager 1 - ECAF Liquid Test Team
Click here to add a user, department or group...
Access will be denied to:
Everyone, except those specifically granted access in the section above.
Click here to add a user or department...
Verify security restrictions:
User to verify:
Click here to select a user...

The Obtain Consent screen will be updated to illustrate the new security restrictions:


Consent Restrictions
Restrictions
Consent is ONLY available to:
New Worker1 - ECAF Liquid Test Team
Ecaf Manager 1 - ECAF Liquid Test Team
Specify Consent Restrictions

6. Enter **Comments** *(if required)*
7. Enter **Document Reference** *(if required)*
8. Click **Create Record**




**Unable to create record.**

**Please confirm that the information is correct by checking the Confirm option below**

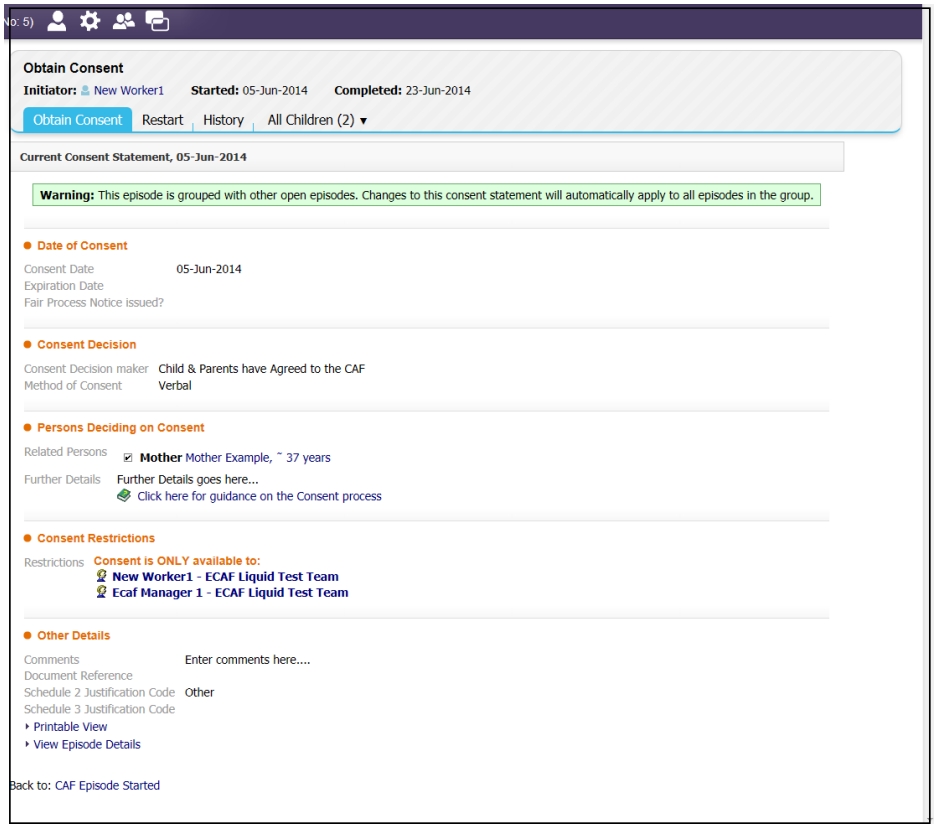
Tip: If presented with the above error message you will need to tick confirm on the consent statement to confirm the information recorded so far.. Please note this functionality can be enabled or disabled via system configuration Maintenance via the Menu.

| | | |
|---|---|---|
| Consent | Force consent confirmation* | **Yes** |

Select

Checkbox and Click **Create Record**

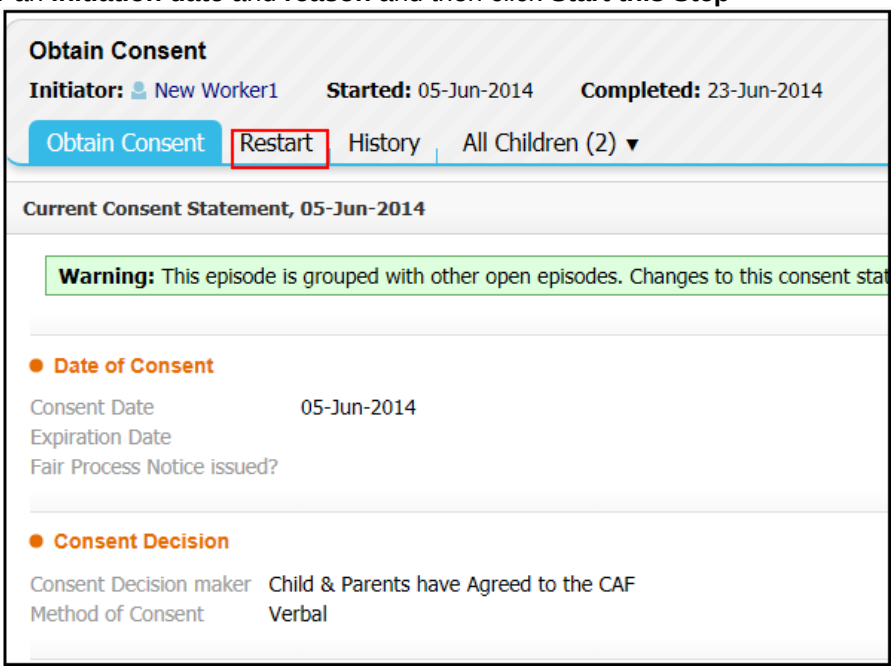
The consent statement will be saved and displayed as the **Current Consent Statement** for the current episode:


Obtain Consent
Initiator: New Worker1 Started: 05-Jun-2014 Completed: 23-Jun-2014
Obtain Consent Restart History All Children (2)
Current Consent Statement, 05-Jun-2014
Warning: This episode is grouped with other open episodes. Changes to this consent statement will automatically apply to all episodes in the group.
Date of Consent
Consent Date 05-Jun-2014
Expiration Date
Fair Process Notice issued?
Consent Decision
Consent Decision maker Child & Parents have Agreed to the CAF
Method of Consent Verbal
Persons Deciding on Consent
Related Persons Mother Mother Example, ~ 37 years
Further Details Further Details goes here...
Click here for guidance on the Consent process
Consent Restrictions
Restrictions Consent is ONLY available to:
New Worker1 - ECAF Liquid Test Team
Ecaf Manager 1 - ECAF Liquid Test Team
Other Details
Comments Enter comments here....
Document Reference
Schedule 2 Justification Code Other
Schedule 3 Justification Code
Printable View
View Episode Details
Back to: CAF Episode Started

## Restart Obtaining Consent

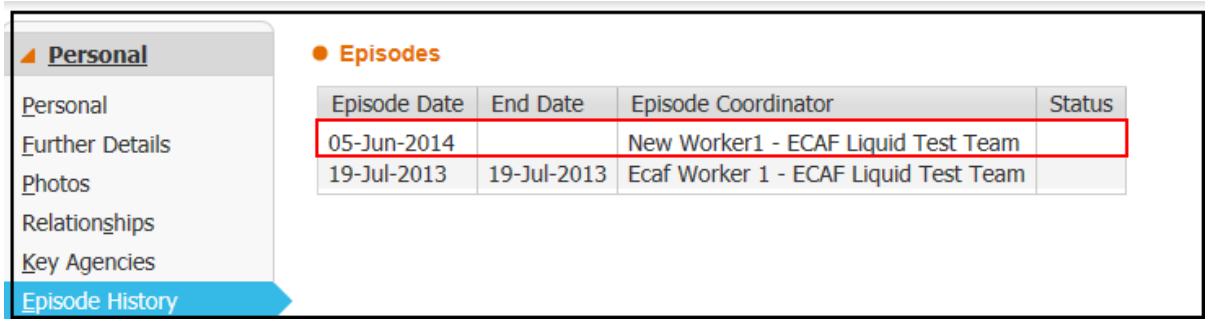
The current consent statement can be restarted, a new consent statement obtained, if required.

1. From the **Obtain Consent** stage, select the **Restart** tab
2. Enter an **initiation date** and **reason** and then click **Start this Step**

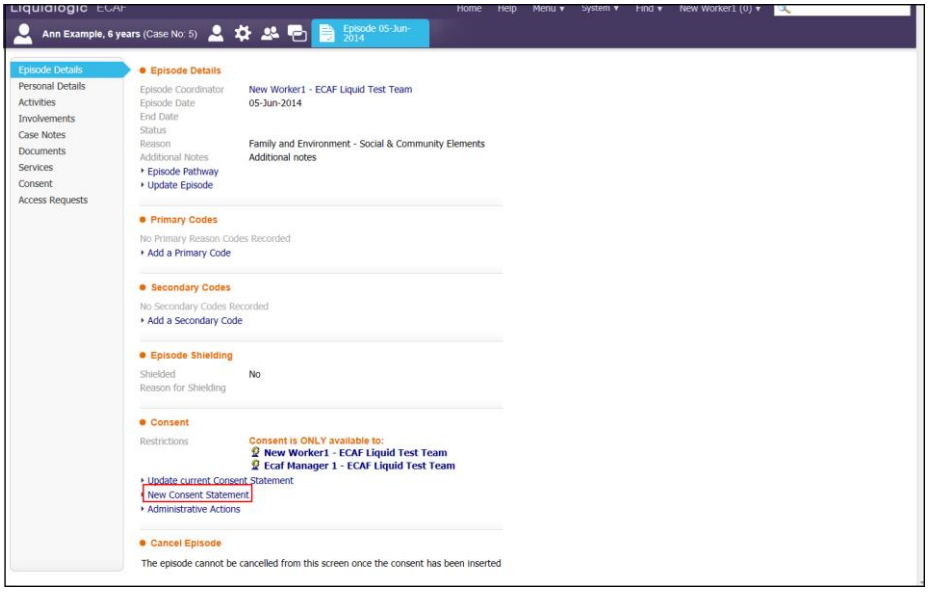

Obtain Consent
Initiator: New Worker1 Started: 05-Jun-2014 Completed: 23-Jun-2014
Obtain Consent Restart History All Children (2)
Current Consent Statement, 05-Jun-2014
Warning: This episode is grouped with other open episodes. Changes to this consent stat
Date of Consent
Consent Date 05-Jun-2014
Expiration Date
Fair Process Notice issued?
Consent Decision
Consent Decision maker Child & Parents have Agreed to the CAF
Method of Consent Verbal

OR

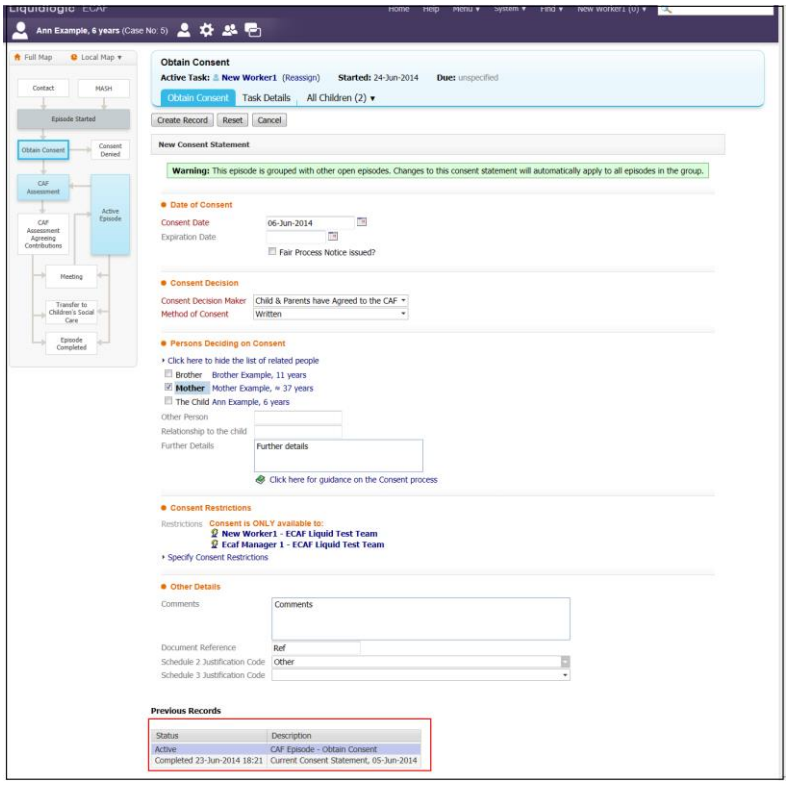
1. From the **Episode History** tab within Demographics, select the current episode:




2. From the **Episode Details** tab, click **New Consent Statement**

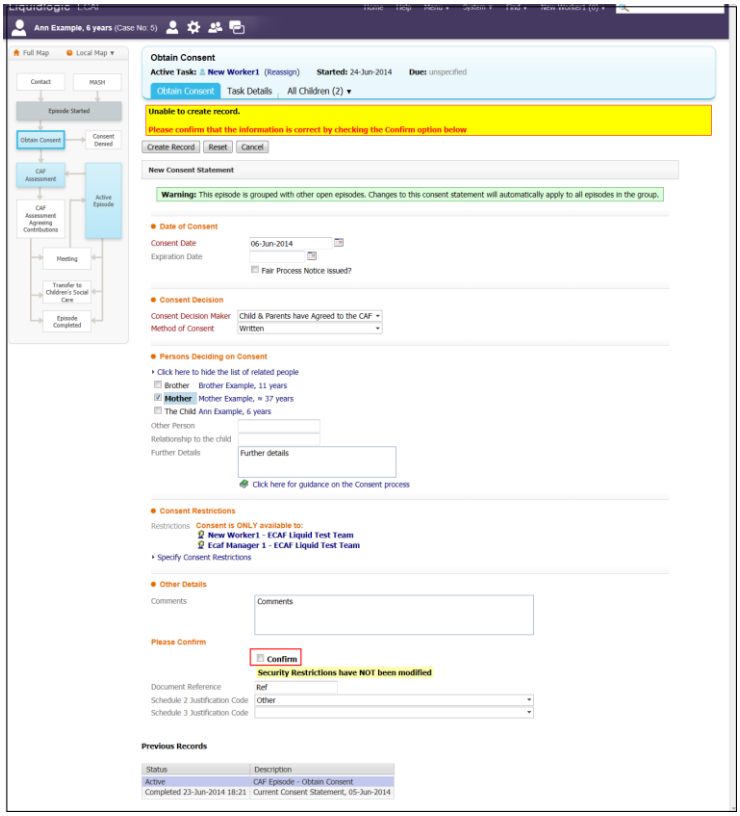



A new 'Obtain Consent' screen will be displayed, facilitating the user to record new details including updating access and restrictions as required. Please refer to the earlier **New Consent Statement** section in this document for details.


Ann Example, 6 years (Case No: 5)
Obtain Consent
Active Task: New Worker1 (Reassign) Started: 24-Jun-2014 Due: unspecified
Obtain Consent | Task Details | All Children (2)
Create Record | Reset | Cancel
New Consent Statement
Warning: This episode is grouped with other open episodes. Changes to this consent statement will automatically apply to all episodes in the group.
Date of Consent
Consent Date 06-Jun-2014
Expiration Date
Fair Process Notice issued?
Consent Decision
Consent Decision Maker Child & Parents have Agreed to the CAF
Method of Consent Written
Persons Deciding on Consent
Click here to hide the list of related people
Brother Brother Example, 11 years
Mother Mother Example, ≈ 37 years
The Child Ann Example, 6 years
Other Person
Relationship to the child
Further Details Further details
Click here for guidance on the Consent process
Consent Restrictions
Restrictions Consent is ONLY available to:
New Worker1 - ECAF Liquid Test Team
Ecaf Manager 1 - ECAF Liquid Test Team
Specify Consent Restrictions
Other Details
Comments Comments
Document Reference Ref
Schedule 2 Justification Code Other
Schedule 3 Justification Code
Previous Records
Status Description
Active CAF Episode - Obtain Consent
Completed 23-Jun-2014 18:21 Current Consent Statement, 05-Jun-2014

**Tip: Previous and Active Consent Statements can be accessed from the list of Previous Records.**

3. Once all details are entered click **Create Record**
4. The EHM system will prompt the user to select the **Confirm** Checkbox to confirm whether security restrictions have been modified and then click **Create Record**

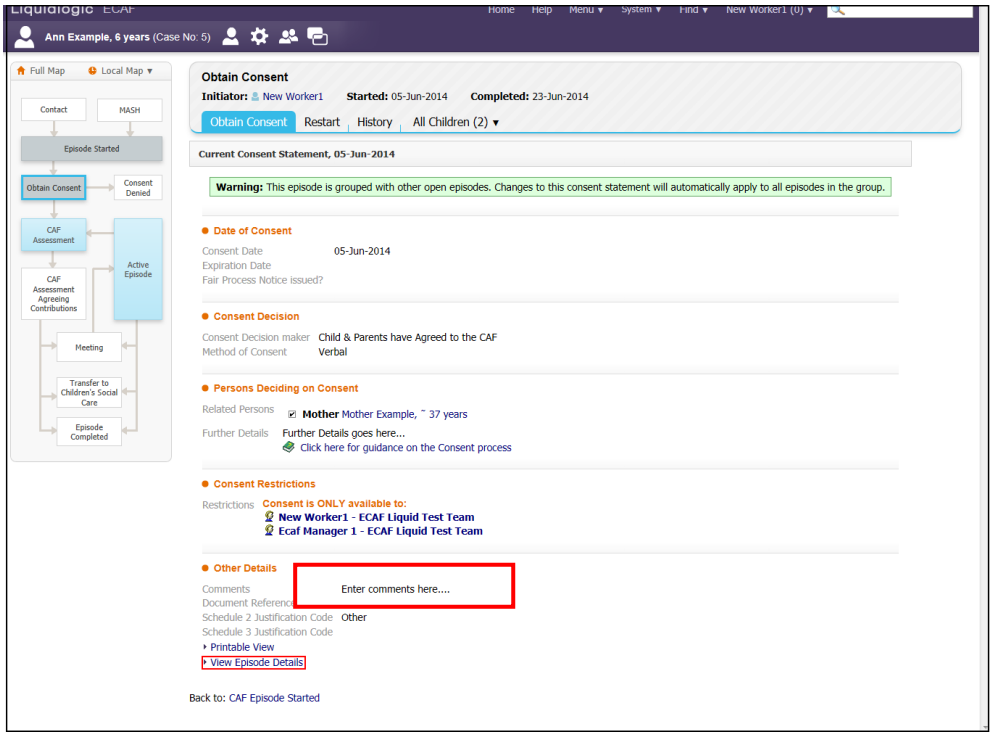

Ann Example, 6 years (Case No: 5)
Obtain Consent
Active Task: New Worker1 (Reassign) Started: 24-Jun-2014 Due: unspecified
Obtain Consent | Task Details | All Children (2)
Unable to create record.
Please confirm that the information is correct by checking the Confirm option below
Create Record | Reset | Cancel
New Consent Statement
Warning: This episode is grouped with other open episodes. Changes to this consent statement will automatically apply to all episodes in the group.
Date of Consent
Consent Date 06-Jun-2014
Expiration Date
Fair Process Notice issued?
Consent Decision
Consent Decision Maker Child & Parents have Agreed to the CAF
Method of Consent Written
Persons Deciding on Consent
Click here to hide the list of related people
Brother Brother Example, 11 years
Mother Mother Example, ≈ 37 years
The Child Ann Example, 6 years
Other Person
Relationship to the child
Further Details Further details
Click here for guidance on the Consent process
Consent Restrictions
Restrictions Consent is ONLY available to:
New Worker1 - ECAF Liquid Test Team
Ecaf Manager 1 - ECAF Liquid Test Team
Specify Consent Restrictions
Other Details
Comments Comments
Please Confirm
Confirm
Security Restrictions have NOT been modified
Document Reference Ref
Schedule 2 Justification Code Other
Schedule 3 Justification Code
Previous Records
Status Description
Active CAF Episode - Obtain Consent
Completed 23-Jun-2014 18:21 Current Consent Statement, 05-Jun-2014

## Updating the Consent Statement

A consent statement may need to be updated over time to reflect new consent comments expressed by the child/young person, parents and EHM professionals. The 'update' facility allows the method of consent, further details and comments to be updated but not the consent date and to whom access is granted or denied. If for example, Access Control Restrictions need to be changed then a 'New Consent Statement' must be recorded instead.

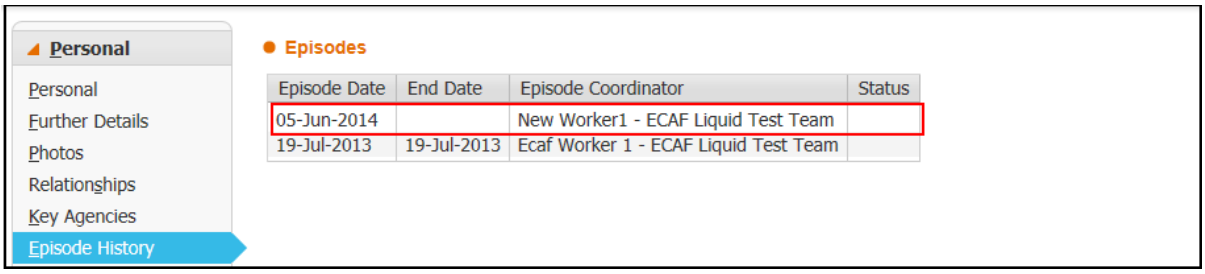
1. Access the **EHM Episode Details** tab within the current EHM episode

**TIP**: Select the **View Episode Details** link from the Current Consent Statement screen:




OR

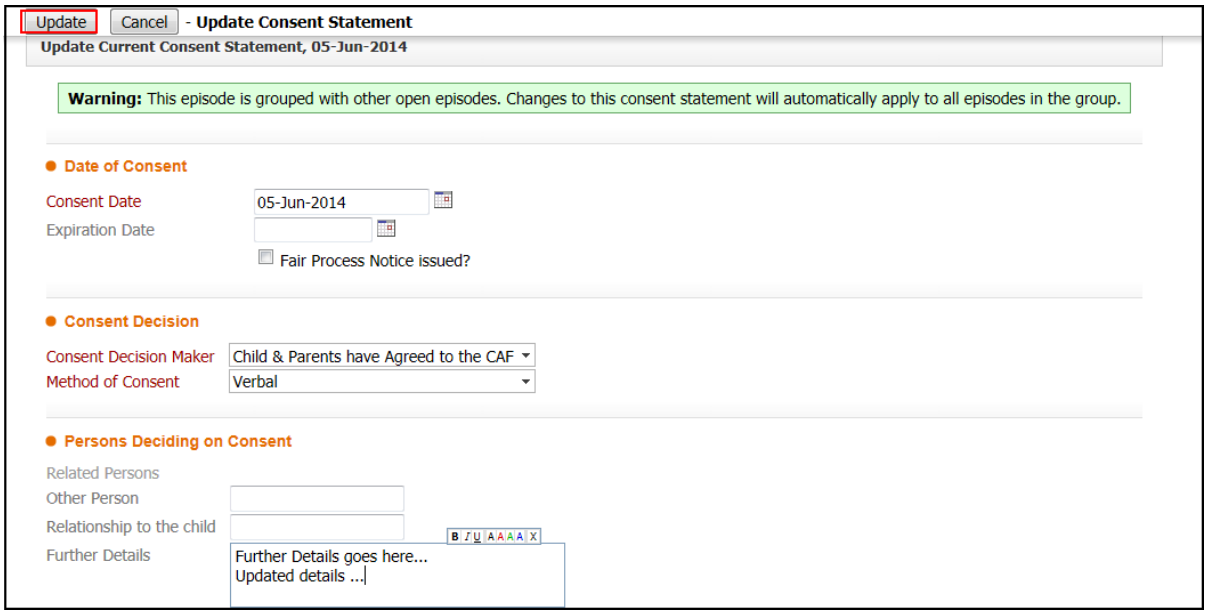
From the **Episode History** tab within Demographics, select the current episode:



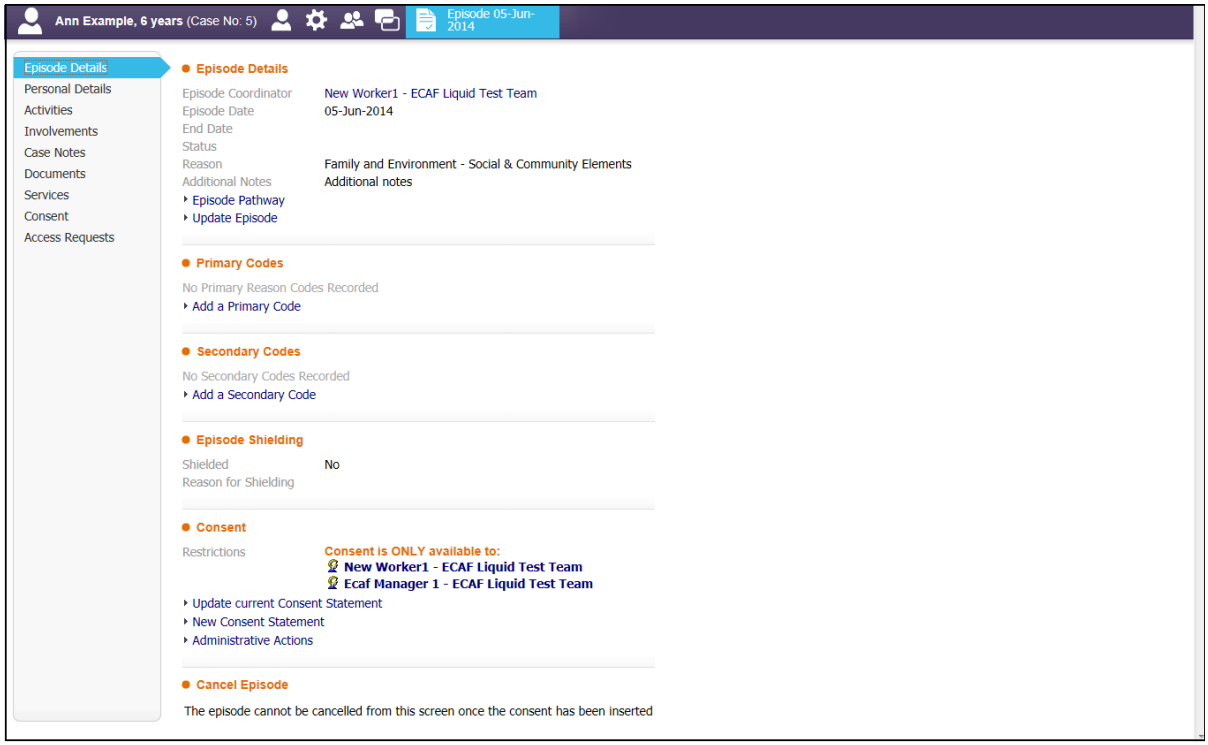
2. Click **Update Current Consent Statement**

The current consent statement opens in an editable view to allow the user to add further details or comments in relation to the current consent:

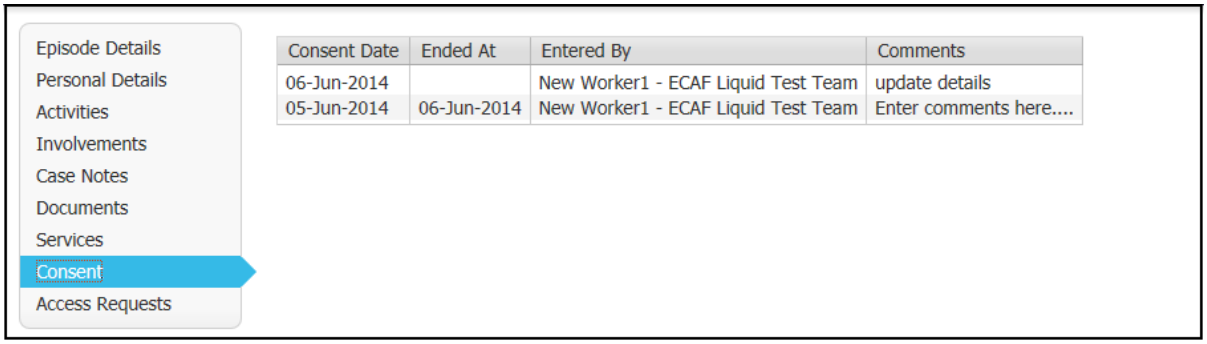
3. Update the **Method of Consent**, **Further Details** and **Comments**, as required and click **Update**



The updated consent statement will be displayed on the **Episode Details** tab:



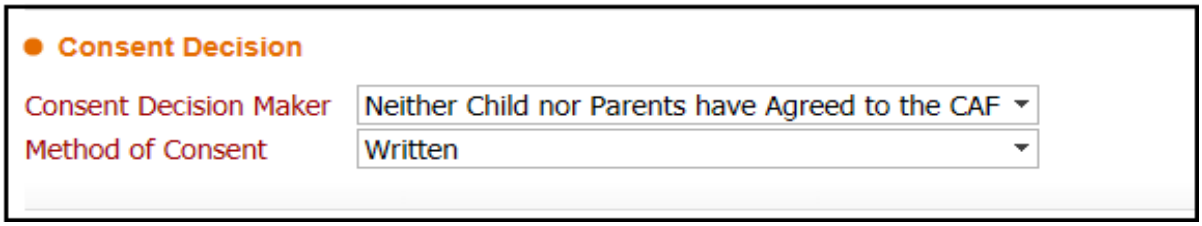

The **Consent** tab (within the EHM Episode Details) will also display a history of Consent Statements:

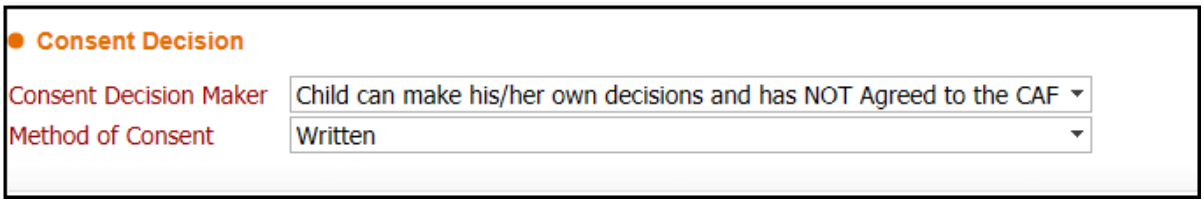

Episode Details
Personal Details
Activities
Involvements
Case Notes
Documents
Services
Consent
Access Requests
Consent Date | Ended At | Entered By | Comments
06-Jun-2014 | | New Worker1 - ECAF Liquid Test Team | update details
05-Jun-2014 | 06-Jun-2014 | New Worker1 - ECAF Liquid Test Team | Enter comments here....

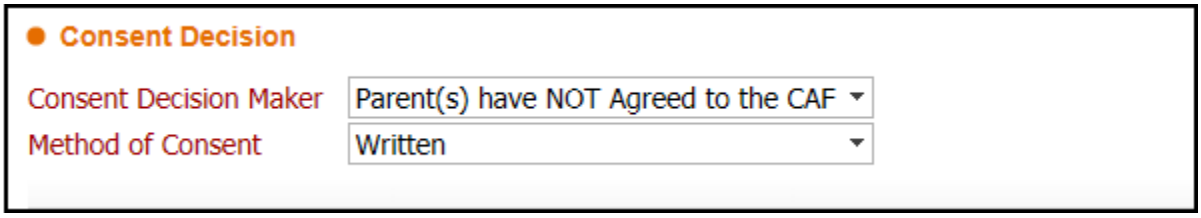
## Consent Denied

If consent is not given within the New Consent Statement then the EHM episode co-ordinator cannot continue with the episode or complete a CAF assessment for this child/young person. The consent denied stage would be activated.

For example, the following responses to the three questions posed will lead to the consent denied stage:



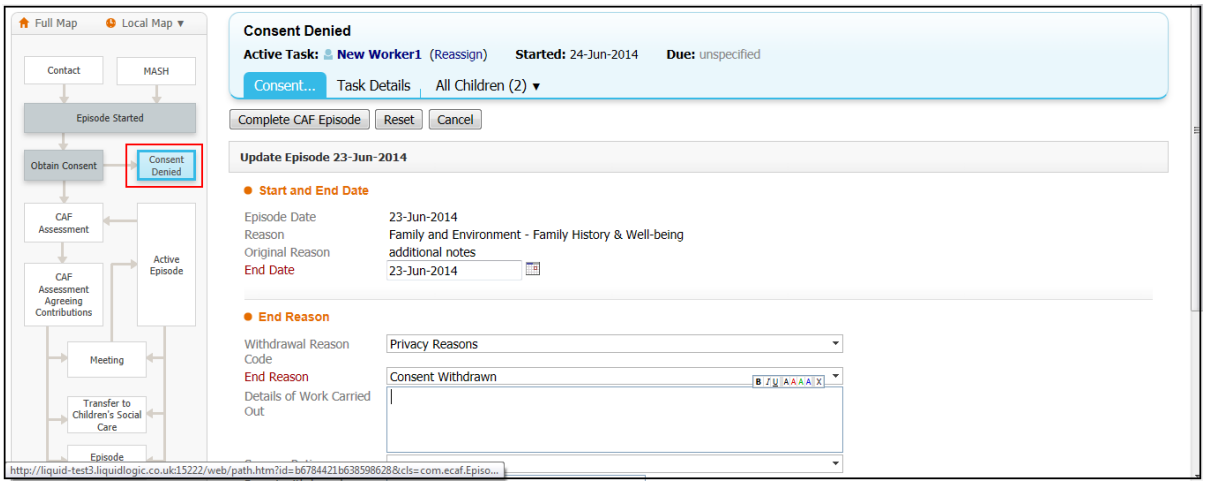


Consent Decision
Consent Decision Maker
Child can make his/her own decisions and has NOT Agreed to the CAF
Method of Consent
Written




1. Complete the new consent statement and then click **Create Record**

**NOTE**: Please refer to the earlier section on **New Consent Statement** for details on how to record this.

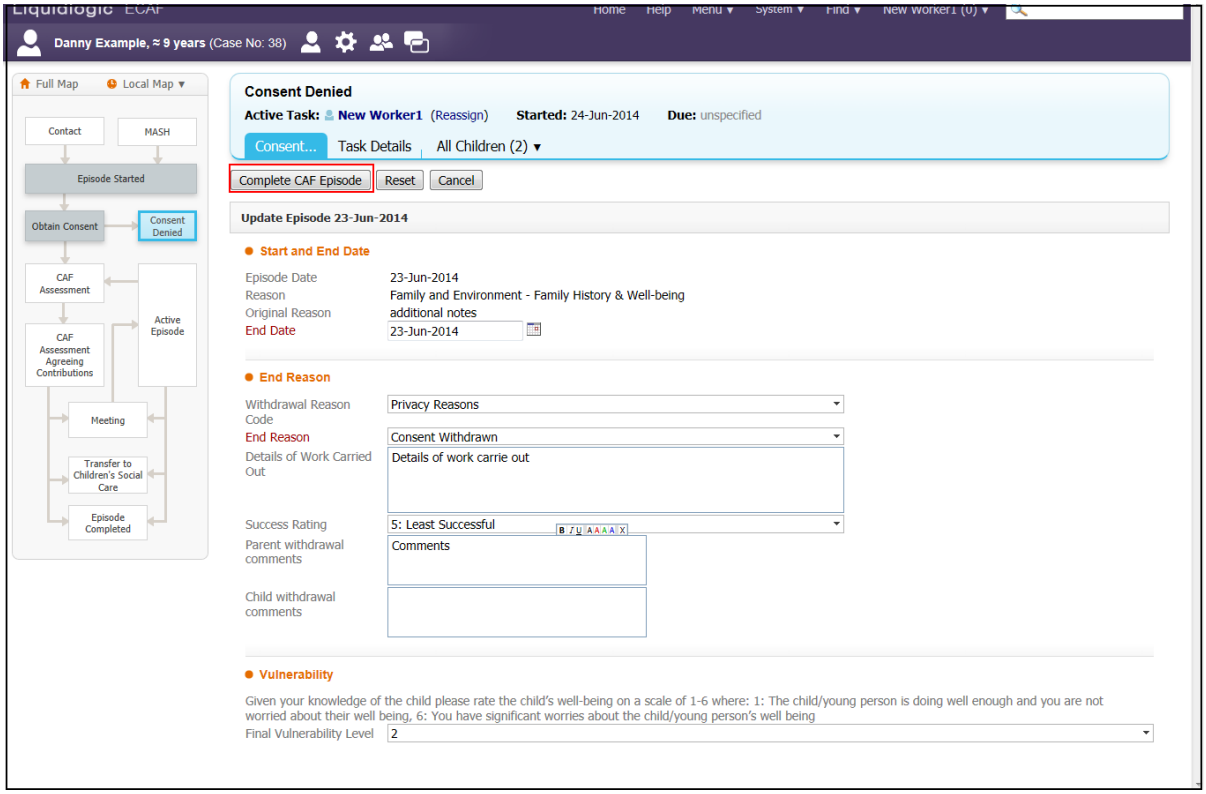
The **Consent Denied** stage is activated on the episode pathway:




A Consent Denied task will also be created within the user's worktray:

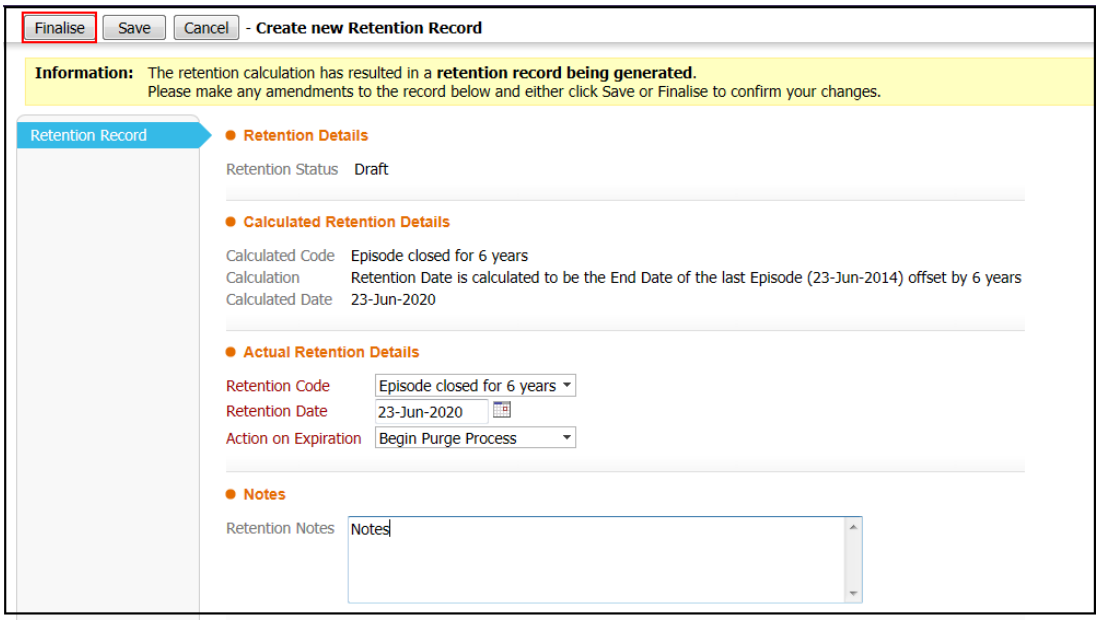
2. Enter the **End Date**
3. Select the **Withdrawal Reason** from the picklist
4. Select the **End Reason** from the picklist
5. Record any **details of work carried o**ut, if applicable

6. Select a **Success Rating** from the picklist, if applicable
7. Record **Parental withdrawal comments**, if applicable.
8. Record **Child withdrawal comments**, if applicable.
9. Select a **Final Vulnerability Level** from the picklist, if applicable
10. Click **Complete Episode**

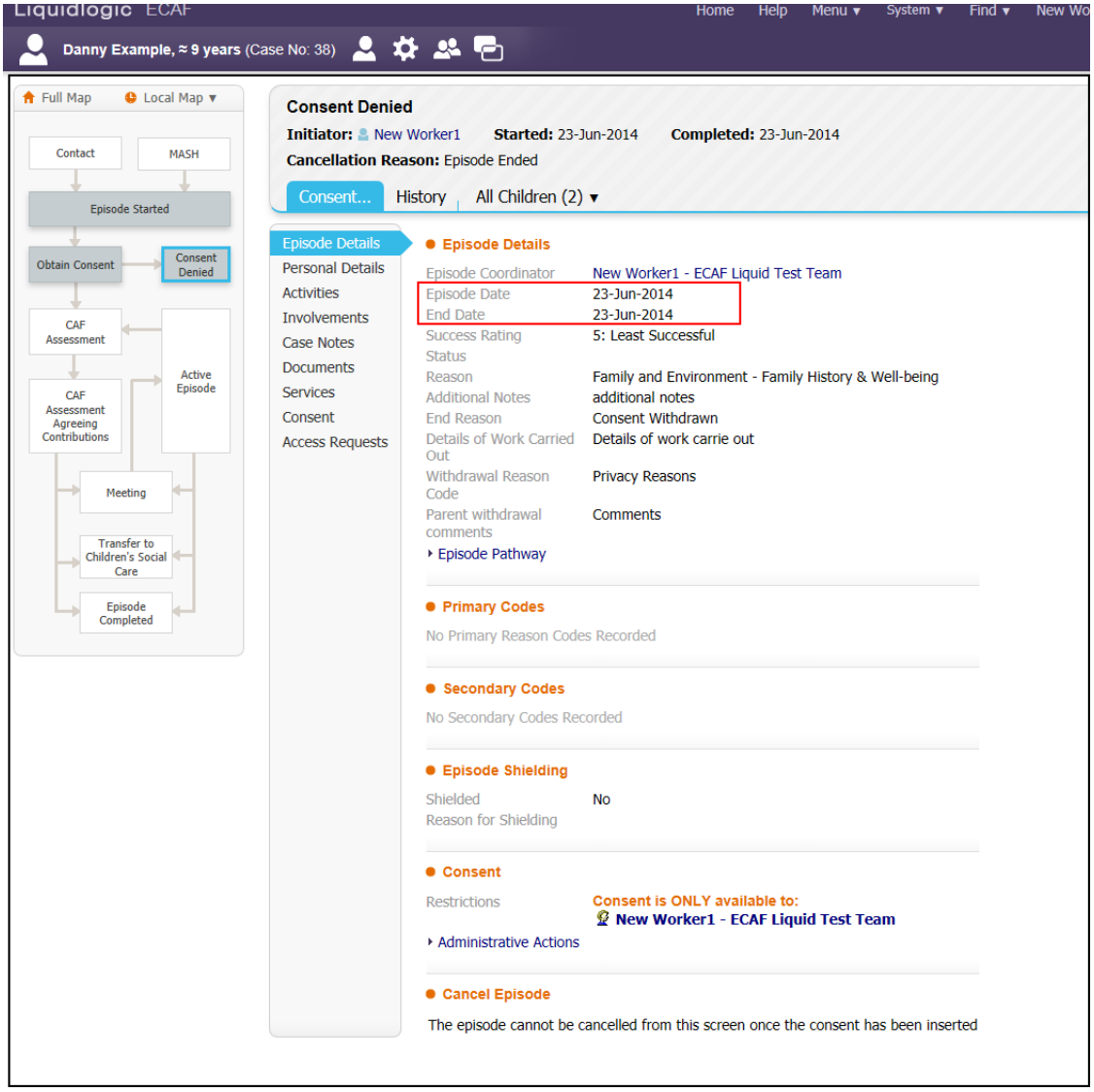

Liquidlogic ECAF
Home Help Menu System Find New Worker1 (0)
Danny Example, ≈ 9 years (Case No: 38)
Full Map
Local Map
Contact
MASH
Episode Started
Obtain Consent
Consent Denied
CAF Assessment
Active Episode
CAF Assessment Agreeing Contributions
Meeting
Transfer to Children's Social Care
Episode Completed
Consent Denied
Active Task: New Worker1 (Reassign) Started: 24-Jun-2014 Due: unspecified
Consent... Task Details All Children (2)
Complete CAF Episode Reset Cancel
Update Episode 23-Jun-2014
Start and End Date
Episode Date 23-Jun-2014
Reason Family and Environment - Family History & Well-being
Original Reason additional notes
End Date 23-Jun-2014
End Reason
Withdrawal Reason Code Privacy Reasons
End Reason Consent Withdrawn
Details of Work Carried Out Details of work carrie out
Success Rating 5: Least Successful
Parent withdrawal comments Comments
Child withdrawal comments
Vulnerability
Given your knowledge of the child please rate the child's well-being on a scale of 1-6 where: 1: The child/young person is doing well enough and you are not worried about their well being, 6: You have significant worries about the child/young person's well being
Final Vulnerability Level 2

The Retention Record screen will be displayed:

11. Select a **Retention Code** from the picklist
12. Update the **Retention date**, if appropriate
13. Specify the **Action on Expiration** from the picklist
14. Record **Retention Notes** and the **Paper File Location** and then click **Finalise**


Finalise Save Cancel - Create new Retention Record
Information: The retention calculation has resulted in a retention record being generated.
Please make any amendments to the record below and either click Save or Finalise to confirm your changes.
Retention Record
Retention Details
Retention Status Draft
Calculated Retention Details
Calculated Code Episode closed for 6 years
Calculation Retention Date is calculated to be the End Date of the last Episode (23-Jun-2014) offset by 6 years
Calculated Date 23-Jun-2020
Actual Retention Details
Retention Code Episode closed for 6 years
Retention Date 23-Jun-2020
Action on Expiration Begin Purge Process
Notes
Retention Notes Notes

The EHM Episode will be displayed as completed, ending at the Consent Denied stage.


Liquidlogic ECAF
Home
Help
Menu
System
Find
New Wo
Danny Example, ≈ 9 years (Case No: 38)
Full Map
Local Map
Contact
MASH
Episode Started
Obtain Consent
Consent Denied
CAF Assessment
Active Episode
CAF Assessment Agreeing Contributions
Meeting
Transfer to Children's Social Care
Episode Completed
Consent Denied
Initiator: New Worker1
Started: 23-Jun-2014
Completed: 23-Jun-2014
Cancellation Reason: Episode Ended
Consent...
History
All Children (2)
Episode Details
Personal Details
Activities
Involvements
Case Notes
Documents
Services
Consent
Access Requests
Episode Details
Episode Coordinator
New Worker1 - ECAF Liquid Test Team
Episode Date
23-Jun-2014
End Date
23-Jun-2014
Success Rating
5: Least Successful
Status
Reason
Family and Environment - Family History & Well-being
Additional Notes
additional notes
End Reason
Consent Withdrawn
Details of Work Carried Out
Details of work carrie out
Withdrawal Reason Code
Privacy Reasons
Parent withdrawal comments
Comments
Episode Pathway
Primary Codes
No Primary Reason Codes Recorded
Secondary Codes
No Secondary Codes Recorded
Episode Shielding
Shielded
No
Reason for Shielding
Consent
Restrictions
Consent is ONLY available to:
New Worker1 - ECAF Liquid Test Team
Administrative Actions
Cancel Episode
The episode cannot be cancelled from this screen once the consent has been inserted

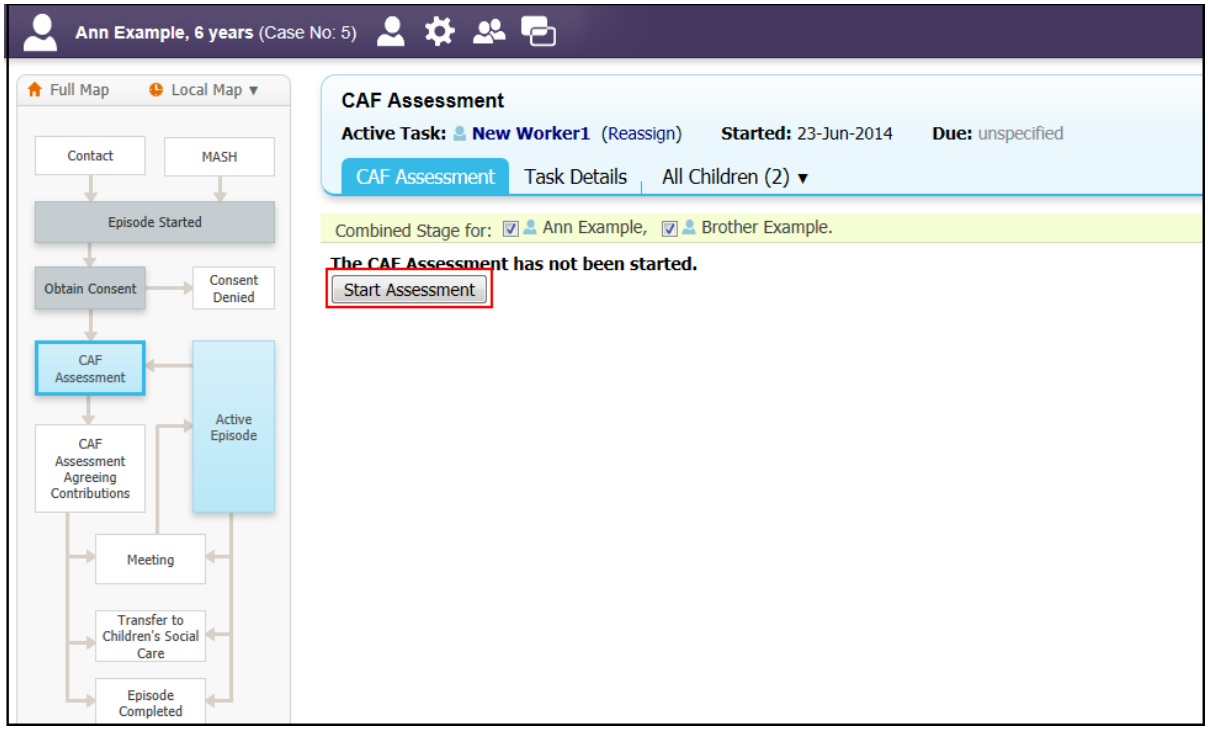
## *Starting CAF Assessments*

Once a Current CAF episode has been created and consent obtained and record, the Episode Coordinator will receive a task in their work tray to **Complete a CAF Assessment for the child**.

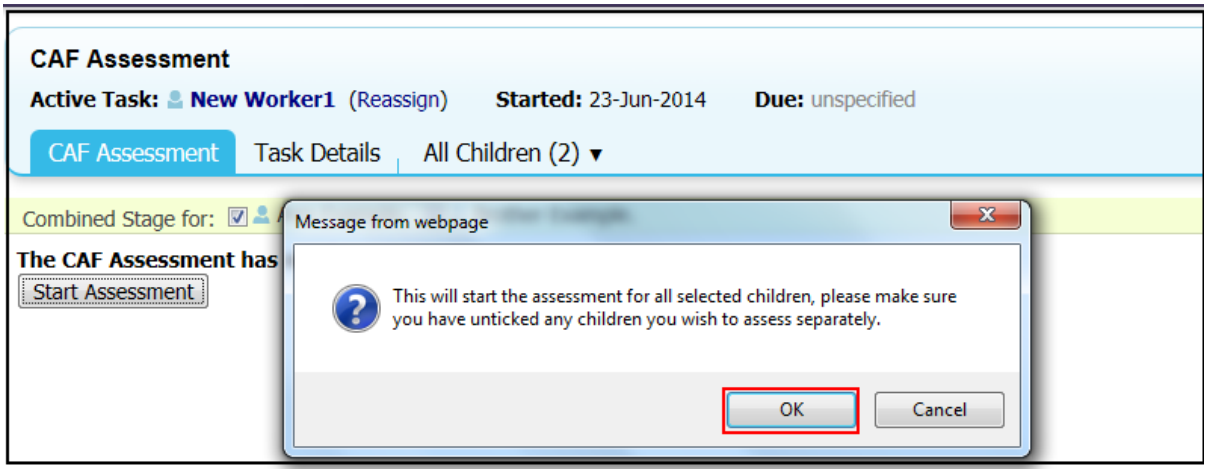
| | |
|---|---|
| No Due Date | **CAF Assessment - Please complete CAF Assessment for Person** |

**NOTE**: The episode coordinator is the only person that can start the CAF assessment within EHM; however other professionals can contribute to the assessment once it has been started by the Episode Coordinator.

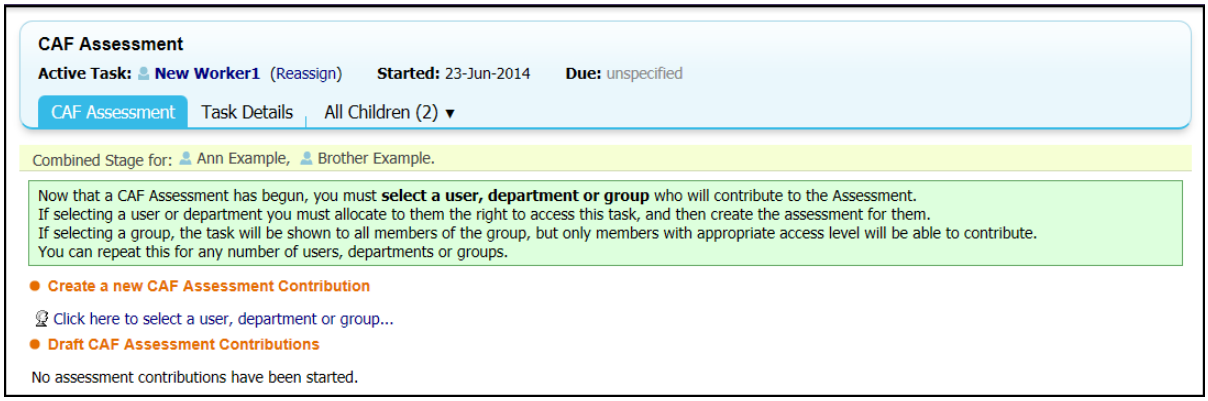
1. Click on the task **CAF Assessment – Please Complete CAF Assessment for Child**
2. Click **Start Assessment**



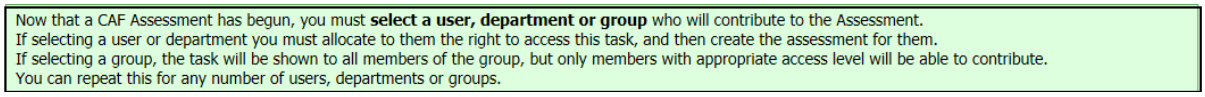

3. Click OK to confirm



A CAF assessment can also be allocated to other EHM users to allow them to contribute to the assessment.


CAF Assessment
Active Task: New Worker1 (Reassign) Started: 23-Jun-2014 Due: unspecified
CAF Assessment
Task Details
All Children (2)
Combined Stage for: Ann Example, Brother Example.
Now that a CAF Assessment has begun, you must select a user, department or group who will contribute to the Assessment.
If selecting a user or department you must allocate to them the right to access this task, and then create the assessment for them.
If selecting a group, the task will be shown to all members of the group, but only members with appropriate access level will be able to contribute.
You can repeat this for any number of users, departments or groups.
Create a new CAF Assessment Contribution
Click here to select a user, department or group...
Draft CAF Assessment Contributions
No assessment contributions have been started.

**TIP**: To progress through a stage in the system refer to the helpful hints/tips displayed in the green box. For example:


Now that a CAF Assessment has begun, you must select a user, department or group who will contribute to the Assessment.
If selecting a user or department you must allocate to them the right to access this task, and then create the assessment for them.
If selecting a group, the task will be shown to all members of the group, but only members with appropriate access level will be able to contribute.
You can repeat this for any number of users, departments or groups.

## CAF Assessment Contributions

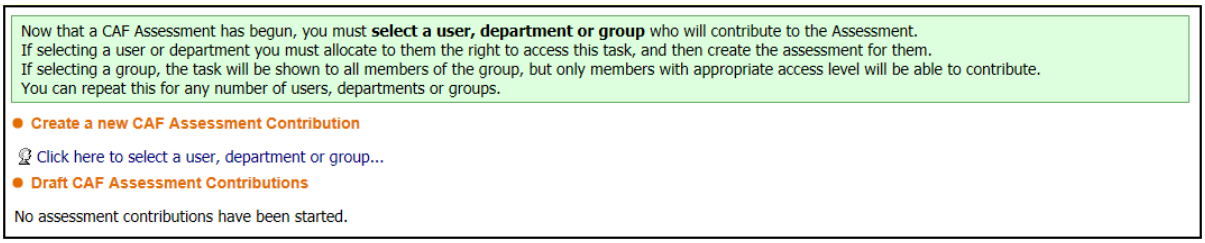
Both the episode coordinator and other active EHM users can contribute to a child/young person's EHM assessment providing that they have consent.

1. Navigate to the **CAF Assessment** stage within the Episode Case Pathway

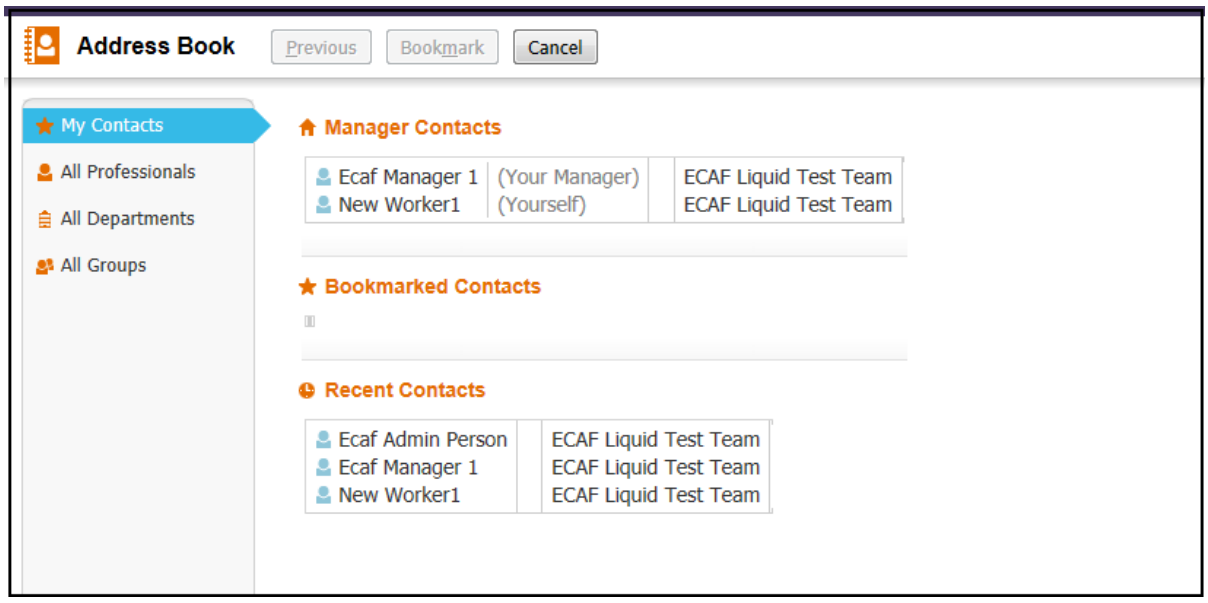
**TIP**: Click on the task **CAF Assessment – Please Complete CAF Assessment for Child** from the work tray:

The CAF assessment contribution screen is displayed:

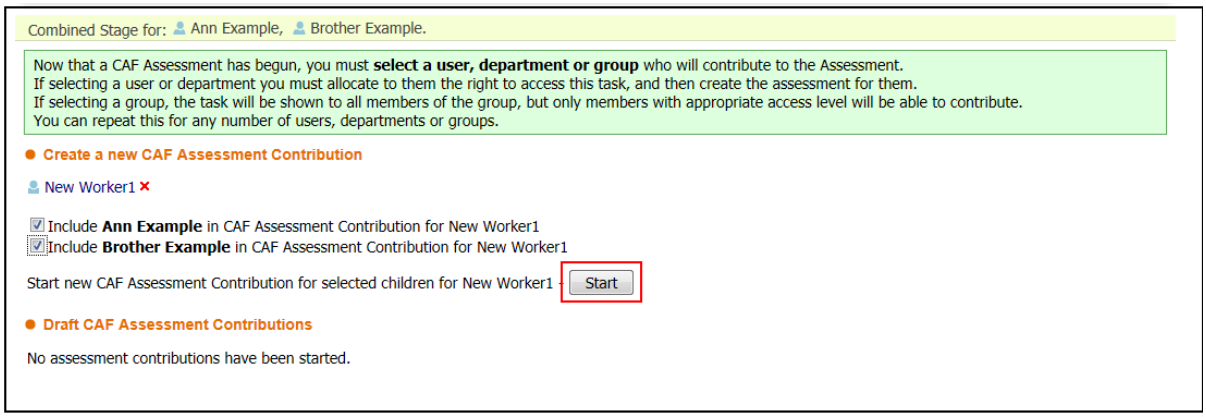
1. Select **Click here to select a user, department or group**


Now that a CAF Assessment has begun, you must select a user, department or group who will contribute to the Assessment.
If selecting a user or department you must allocate to them the right to access this task, and then create the assessment for them.
If selecting a group, the task will be shown to all members of the group, but only members with appropriate access level will be able to contribute.
You can repeat this for any number of users, departments or groups.
Create a new CAF Assessment Contribution
Click here to select a user, department or group...
Draft CAF Assessment Contributions
No assessment contributions have been started.

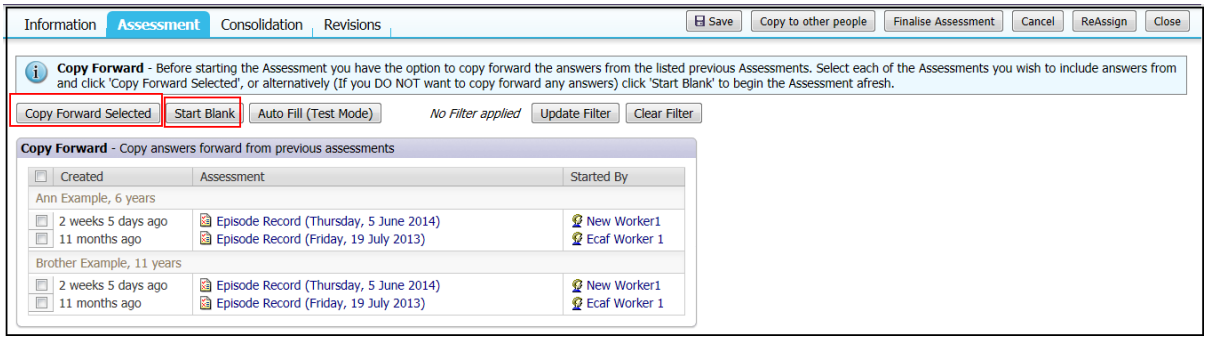
2. From the Address Book, browse for and select a contributor to the CAF Assessment and confirm this selection




3. Click **Start** to activate this Contribution to the CAF Assessment


Combined Stage for: Ann Example, Brother Example.
Now that a CAF Assessment has begun, you must select a user, department or group who will contribute to the Assessment.
If selecting a user or department you must allocate to them the right to access this task, and then create the assessment for them.
If selecting a group, the task will be shown to all members of the group, but only members with appropriate access level will be able to contribute.
You can repeat this for any number of users, departments or groups.
Create a new CAF Assessment Contribution
New Worker1
Include Ann Example in CAF Assessment Contribution for New Worker1
Include Brother Example in CAF Assessment Contribution for New Worker1
Start new CAF Assessment Contribution for selected children for New Worker1
Start
Draft CAF Assessment Contributions
No assessment contributions have been started.

**TIP**: If starting a CAF Assessment Contribution which is assigned to yourself then the CAF Form tab will be displayed, prompting the user to either start a new blank form (or if available, to copy forward answers from previously completed CAF Assessments for this child/young person.):

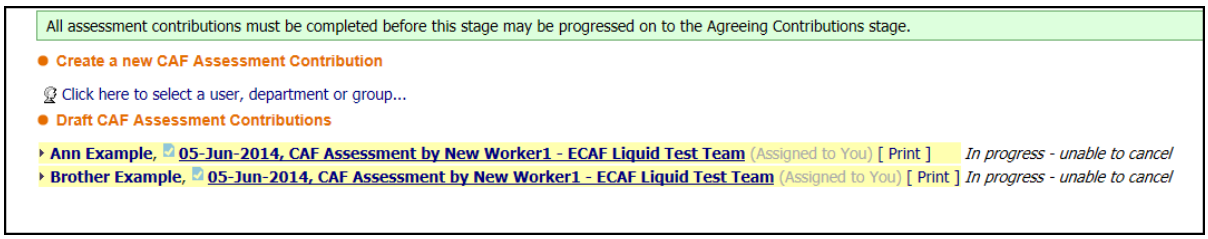

Information
Assessment
Consolidation
Revisions
Save
Copy to other people
Finalise Assessment
Cancel
ReAssign
Close
Copy Forward - Before starting the Assessment you have the option to copy forward the answers from the listed previous Assessments. Select each of the Assessments you wish to include answers from and click 'Copy Forward Selected', or alternatively (If you DO NOT want to copy forward any answers) click 'Start Blank' to begin the Assessment afresh.
Copy Forward Selected
Start Blank
Auto Fill (Test Mode)
No Filter applied
Update Filter
Clear Filter
Copy Forward - Copy answers forward from previous assessments
Created
Assessment
Started By
Ann Example, 6 years
2 weeks 5 days ago
Episode Record (Thursday, 5 June 2014)
New Worker1
11 months ago
Episode Record (Friday, 19 July 2013)
Ecaf Worker 1
Brother Example, 11 years
2 weeks 5 days ago
Episode Record (Thursday, 5 June 2014)
New Worker1
11 months ago
Episode Record (Friday, 19 July 2013)
Ecaf Worker 1

**NOTE**: Please refer to the **CAF form tab** section in this document for further details.

## Assigning Assessment Contributions

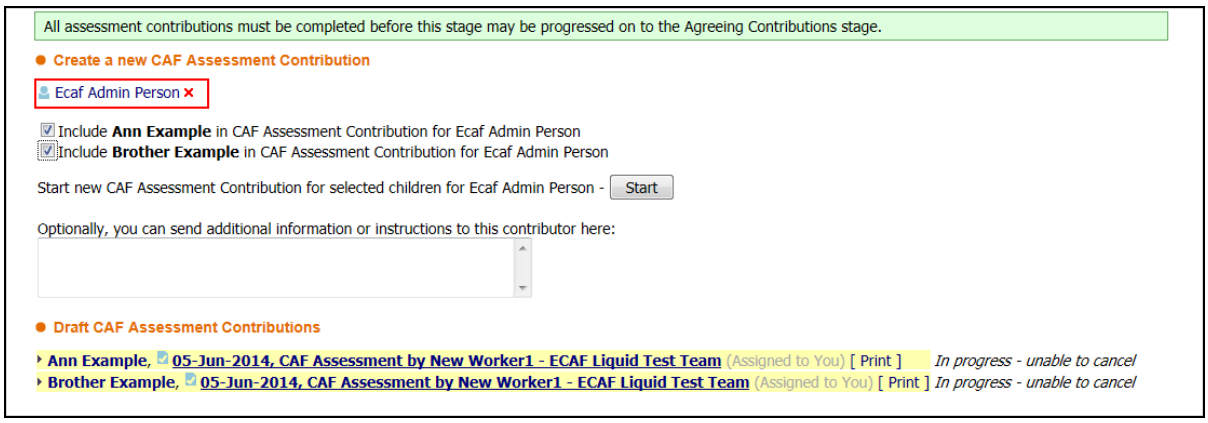
1. Click on the task **CAF Assessment – Please Complete CAF Assessment for Child** from the work tray

2. Select **Click here to select a user, department or group** to add further EHM users to contribute to the CAF Assessment


All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.
Create a new CAF Assessment Contribution
Click here to select a user, department or group...
Draft CAF Assessment Contributions
Ann Example, 05-Jun-2014, CAF Assessment by New Worker1 - ECAF Liquid Test Team (Assigned to You) [ Print ] In progress - unable to cancel
Brother Example, 05-Jun-2014, CAF Assessment by New Worker1 - ECAF Liquid Test Team (Assigned to You) [ Print ] In progress - unable to cancel

3. From the Address Book, browse for and select a contributor to the CAF Assessment and confirm this selection
4. Click **Start**

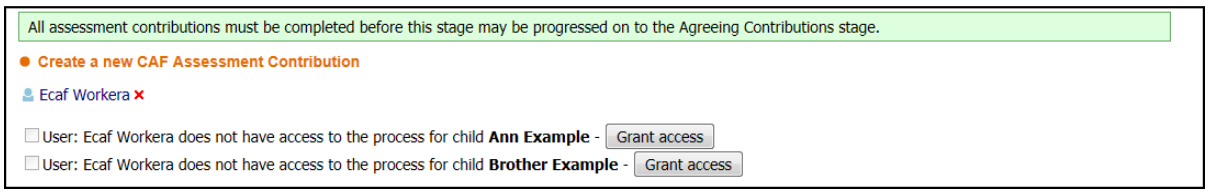
The following example shows the user called 'EHM User 1' has been assigned a new CAF assessment contribution:


All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.
Create a new CAF Assessment Contribution
Ecaf Admin Person ×
Include Ann Example in CAF Assessment Contribution for Ecaf Admin Person
Include Brother Example in CAF Assessment Contribution for Ecaf Admin Person
Start new CAF Assessment Contribution for selected children for Ecaf Admin Person - Start
Optionally, you can send additional information or instructions to this contributor here:
Draft CAF Assessment Contributions
Ann Example, 05-Jun-2014, CAF Assessment by New Worker1 - ECAF Liquid Test Team (Assigned to You) [ Print ] In progress - unable to cancel
Brother Example, 05-Jun-2014, CAF Assessment by New Worker1 - ECAF Liquid Test Team (Assigned to You) [ Print ] In progress - unable to cancel

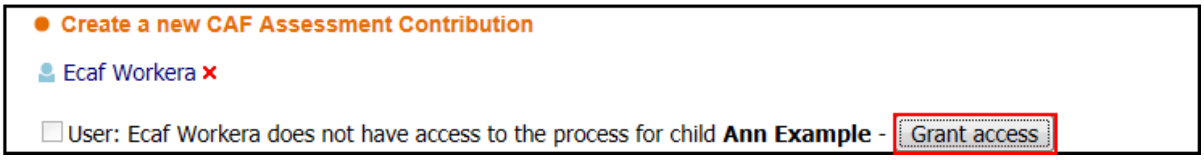
**NOTE**: Please refer to the following section on **Granting Access to CAF Assessment Contributors** if an assessment contributor does not have access to the episode and is not listed within the current consent statement

### *Granting Access to CAF Assessment Contributors*

The EHM Co-ordinator will not be able to start the new CAF Assessment Contribution for this person if they do not have access to the episode, therefore access must be granted. The **Grant Access** button will be displayed instead of the **Start** button for contributors who do not have access. In the example below, the user 'Admin Person' does not have access to the CAF episode, see below:


All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.
Create a new CAF Assessment Contribution
Ecaf Workera
User: Ecaf Workera does not have access to the process for child Ann Example - Grant access
User: Ecaf Workera does not have access to the process for child Brother Example - Grant access

1. Click the **Grant Access** button

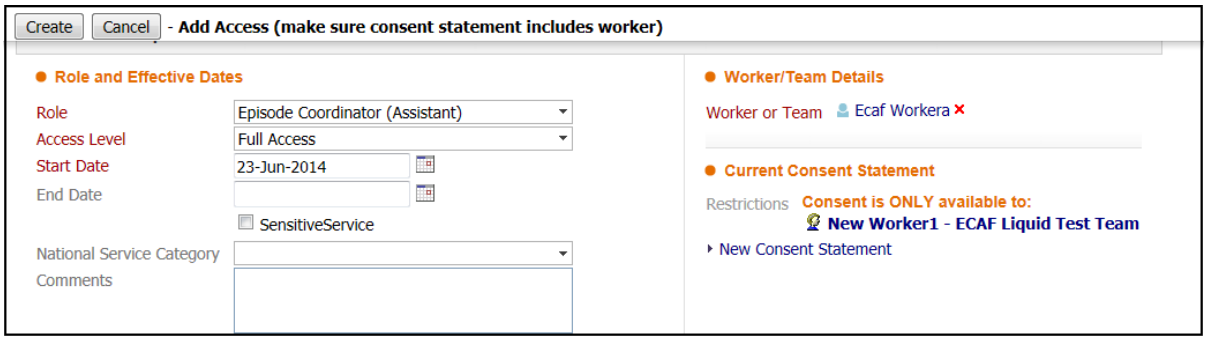

Create a new CAF Assessment Contribution
Ecaf Workera
User: Ecaf Workera does not have access to the process for child Ann Example - Grant access

2. Select the **Role** and **Access level** for the contributor from the picklists
3. Ensure the **Start** date is correct and enter any further information, as required

**TIP: Full**, **Update** and **Read Only** access levels exist. The EHM Coordinator will automatically be assigned full access level.

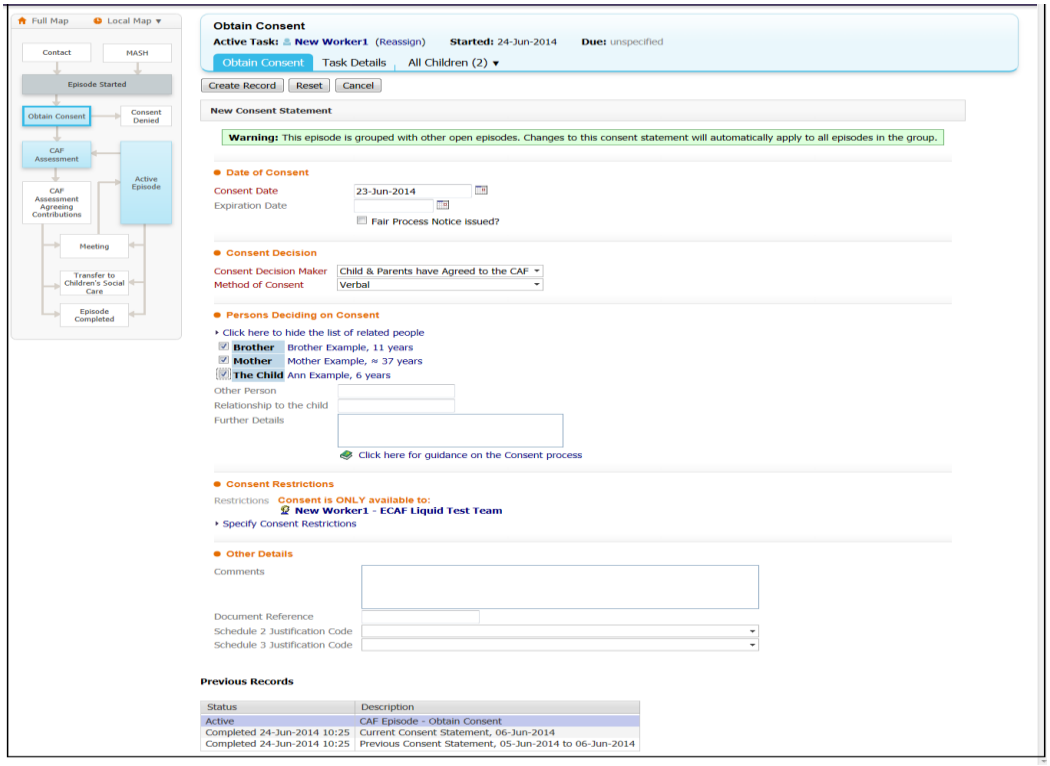
In the example below, the current consent statement does not allow the user: 'Admin Person' to access the episode therefore a new consent statement needs to be created. If the user has already been included in the consent statement then only the role and level of access need to be specified.

4. If the contributor does not have consent, click **New Consent Statement** to update the consent details and include this worker, (otherwise click **Create)**

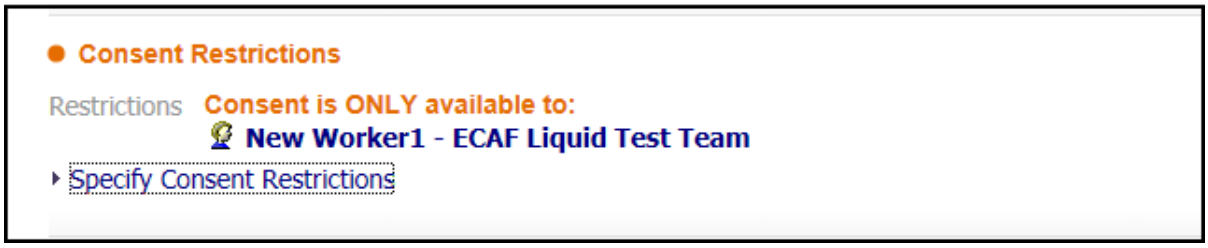



5. Enter the details for the new consent statement, including consent **method** and **date** as required

**NOTE**: Please refer to the earlier **Obtain Consent** section in this document.

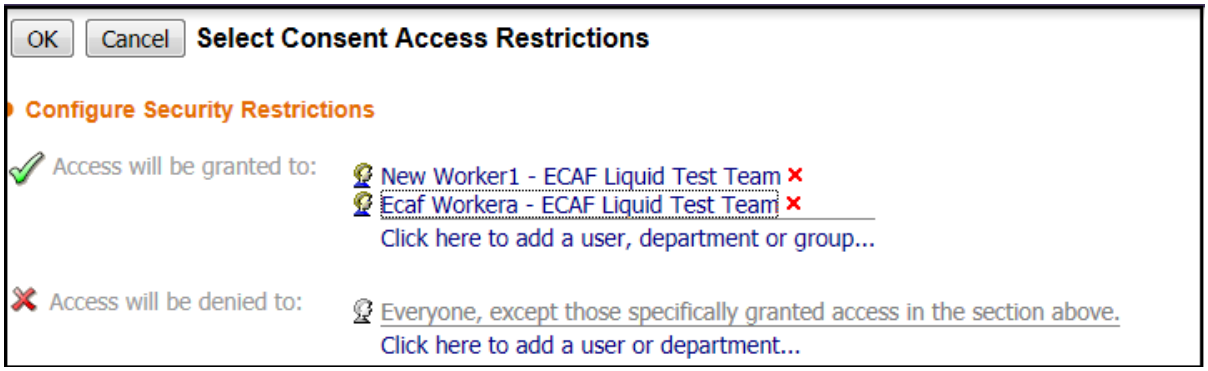



6. Click **Specify Access and Restrictions**

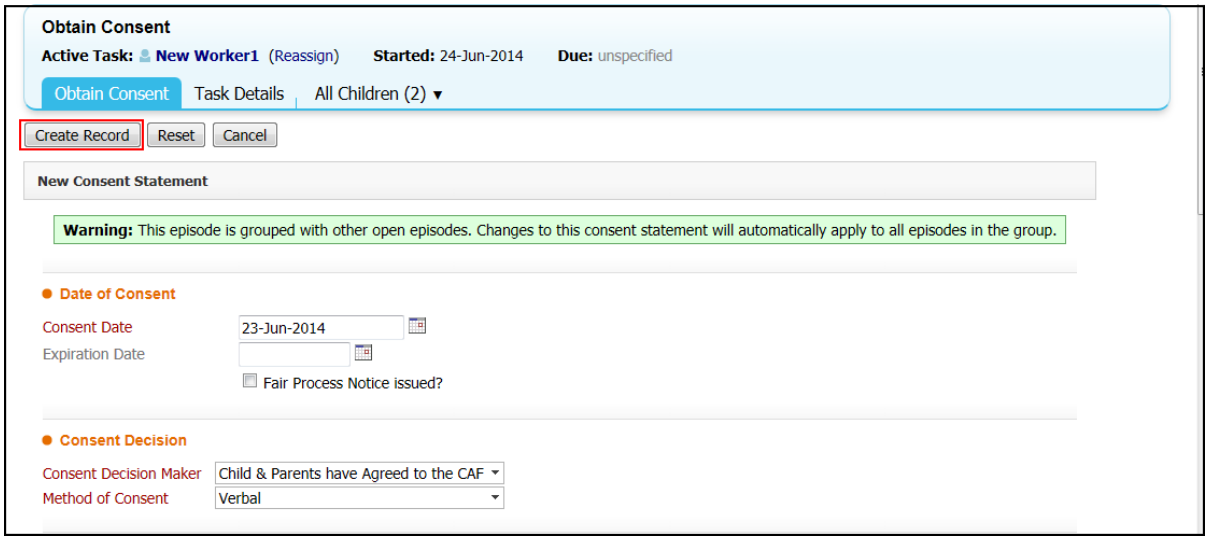



7. Use the **Click here to add a user, department or group…** to grant access to additional user(s) and then click **OK – Restrict Access**

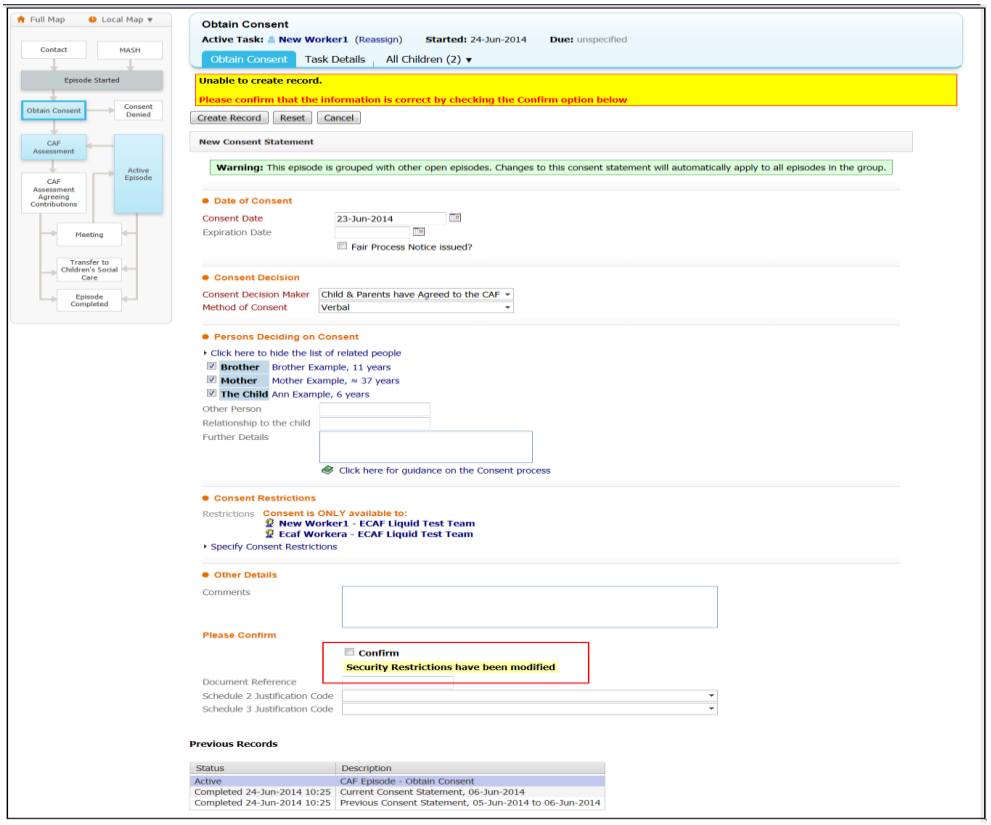
**NOTE**: Please refer to the **Specifying Access and Restrictions** section in this document for details.


OK
Cancel
Select Consent Access Restrictions
Configure Security Restrictions
Access will be granted to:
New Worker1 - ECAF Liquid Test Team
Ecaf Workera - ECAF Liquid Test Team
Click here to add a user, department or group...
Access will be denied to:
Everyone, except those specifically granted access in the section above.
Click here to add a user or department...

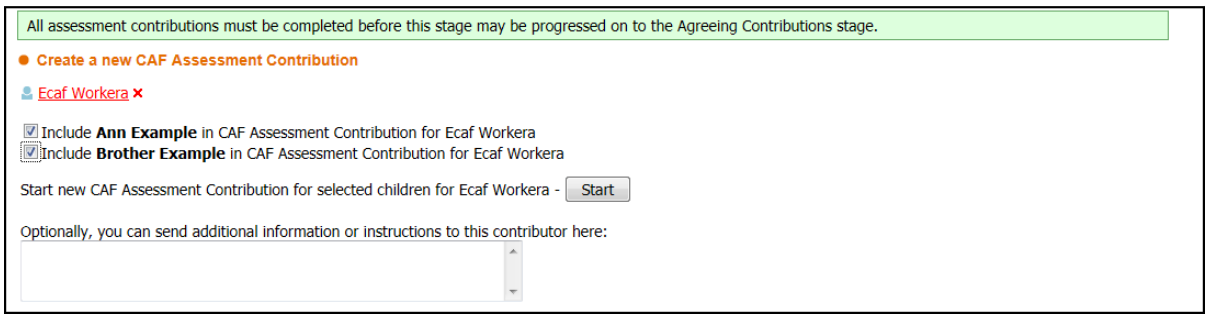
8. Once the New Consent Statement has been updated click **Create Record**



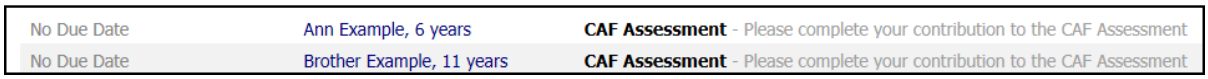

**TIP**: Ensure that the **Confirm** checkbox is selected before clicking **Create Record**




9. Select the checkbox and click on **Start** once the new Assessment Contributor has been granted access to the episode


All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.
Create a new CAF Assessment Contribution
Ecaf Workera
Include Ann Example in CAF Assessment Contribution for Ecaf Workera
Include Brother Example in CAF Assessment Contribution for Ecaf Workera
Start new CAF Assessment Contribution for selected children for Ecaf Workera - Start
Optionally, you can send additional information or instructions to this contributor here:

**NOTE**: The assessment contributor can only begin to contribute to the assessment once the episode co-ordinator clicks the **Start** button as this will generate the task in the contributor's worktray. Each CAF Assessment contributor will receive the following task in their worktray:

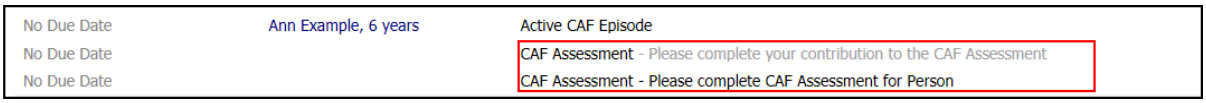

No Due Date
Ann Example, 6 years
CAF Assessment - Please complete your contribution to the CAF Assessment
No Due Date
Brother Example, 11 years
CAF Assessment - Please complete your contribution to the CAF Assessment

The list of CAF Assessment contributions will be updated indicating the status and to whom they are assigned to, see example below:

Combined Stage for: Ann Example, Brother Example.
All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.
Create a new CAF Assessment Contribution
Click here to select a user, department or group...
Draft CAF Assessment Contributions
Ann Example, 05-Jun-2014, CAF Assessment by New Worker1 - ECAF Liquid Test Team (Assigned to You) [ Print ] In progress - unable to cancel
Brother Example, 05-Jun-2014, CAF Assessment by New Worker1 - ECAF Liquid Test Team (Assigned to You) [ Print ] In progress - unable to cancel
Brother Example, 05-Jun-2014, CAF Assessment by Ecaf Admin Person - ECAF Liquid Test Team (Copy Forward) [ Print ]
Cancel
Ann Example, 05-Jun-2014, CAF Assessment by Ecaf Admin Person - ECAF Liquid Test Team (Copy Forward) [ Print ]
Cancel
Ann Example, 05-Jun-2014, CAF Assessment by Ecaf Workera - ECAF Liquid Test Team (Copy Forward) [ Print ]
Cancel
Brother Example, 05-Jun-2014, CAF Assessment by Ecaf Workera - ECAF Liquid Test Team (Copy Forward) [ Print ]
Cancel

## *Completing a CAF Assessment*

1. The Episode Coordinator will need to click on the **CAF Assessment – Please Complete CAF Assessment for child** task from their worktray, however a person recording a contribution to a CAF Assessment will need to click on the **CAF Assessment – Please Complete your contribution to the CAF Assessment** task from their worktray

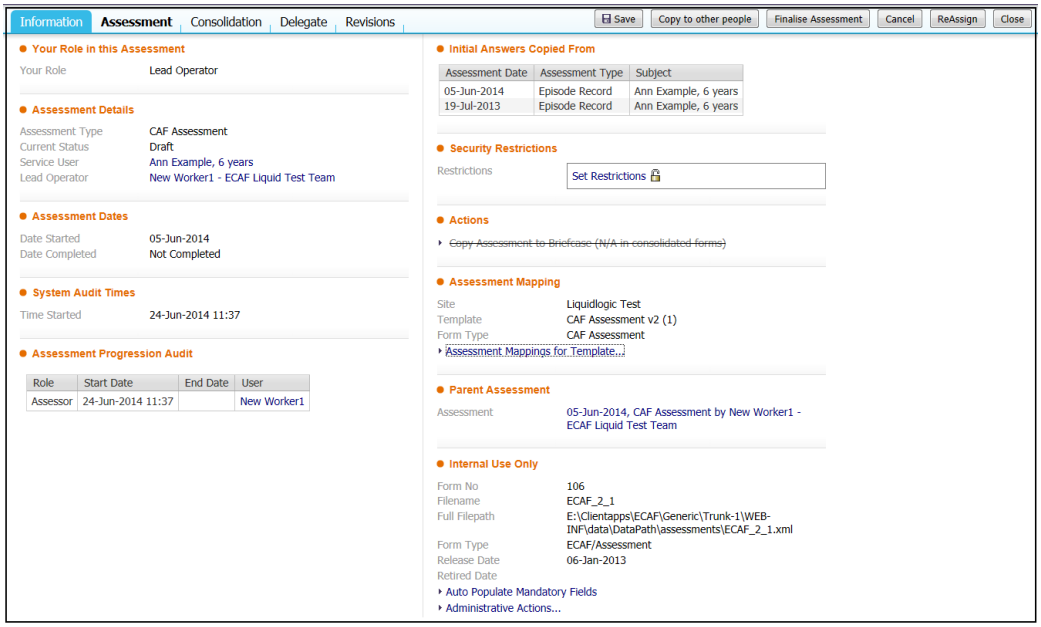

No Due Date
Ann Example, 6 years
Active CAF Episode
No Due Date
CAF Assessment - Please complete your contribution to the CAF Assessment
No Due Date
CAF Assessment - Please complete CAF Assessment for Person

Task for Contributor

The CAF assessment form consists of two tabs; **Information** and **CAF Form**

### Information Tab

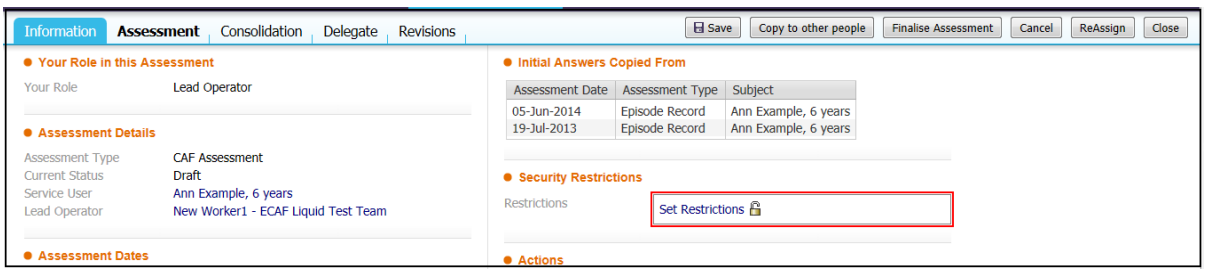
The Information tab appears on all assessment forms and provides summary information specific to the stage in the in the child's case. For example; role of user carrying out assessment, name of user carrying out assessment, child's name, assessment type, assessment date and the assessment progression audit.



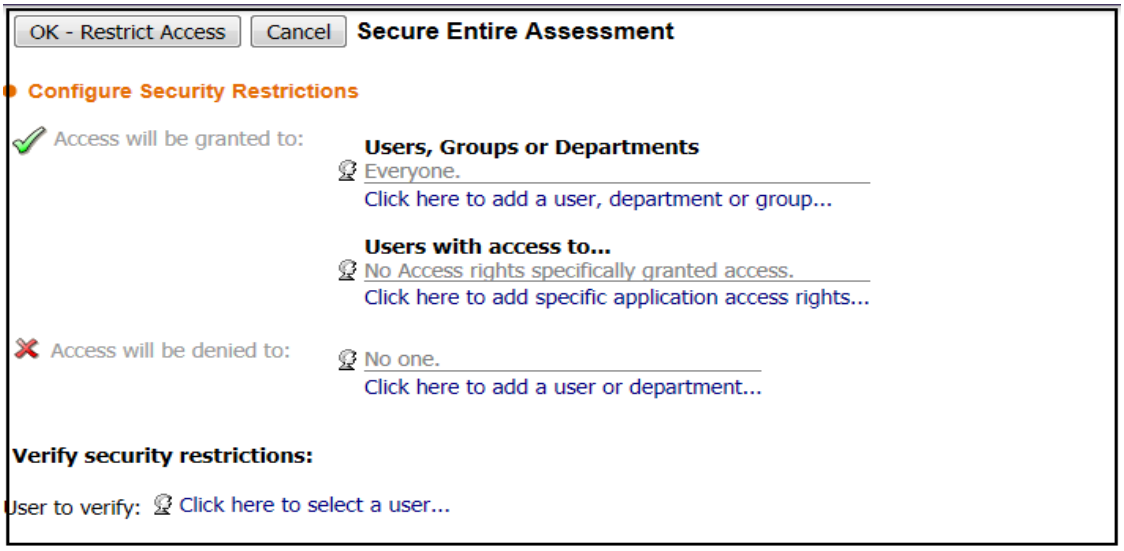

### *Locking an Entire Assessment*

The Information tab facilitates security restrictions to be placed on the assessment, for example, an entire assessment can be locked from user(s) to prevent them from accessing and viewing it. The open padlock indicates no specific security restriction is applied.

1. Click **Set Restrictions** on the Information tab




2. To allow or deny access to an individual user, group or users or department click on **Click here to add a user or department** to the right of **Access with be granted to** or **Access will be denied to**, as required


OK - Restrict Access
Cancel
Secure Entire Assessment
Configure Security Restrictions
Access will be granted to:
Users, Groups or Departments
Everyone.
Click here to add a user, department or group...
Users with access to...
No Access rights specifically granted access.
Click here to add specific application access rights...
Access will be denied to:
No one.
Click here to add a user or department...
Verify security restrictions:
User to verify:
Click here to select a user...

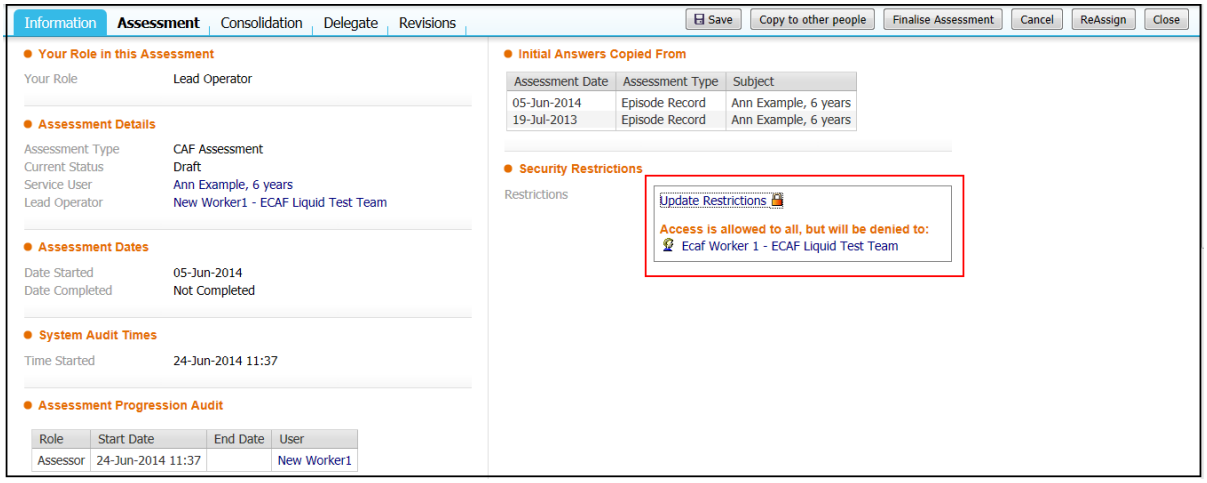
3. Browse for and select the user or department that should be specifically granted or denied access from the **Address Book**

**NOTE**: For further information on using the Address Book please refer to the **EHM General** Manual.

4. Once the user(s) or department have been selected click **OK – Restrict Access**

OK - Restrict Access
Cancel
Secure Entire Assessment
Configure Security Restrictions
Access will be granted to:
Users, Groups or Departments
Everyone.
Click here to add a user, department or group...
Users with access to...
No Access rights specifically granted access.
Click here to add specific application access rights...
Access will be denied to:
No one.
Click here to add a user or department...
Verify security restrictions:
User to verify:
Click here to select a user...

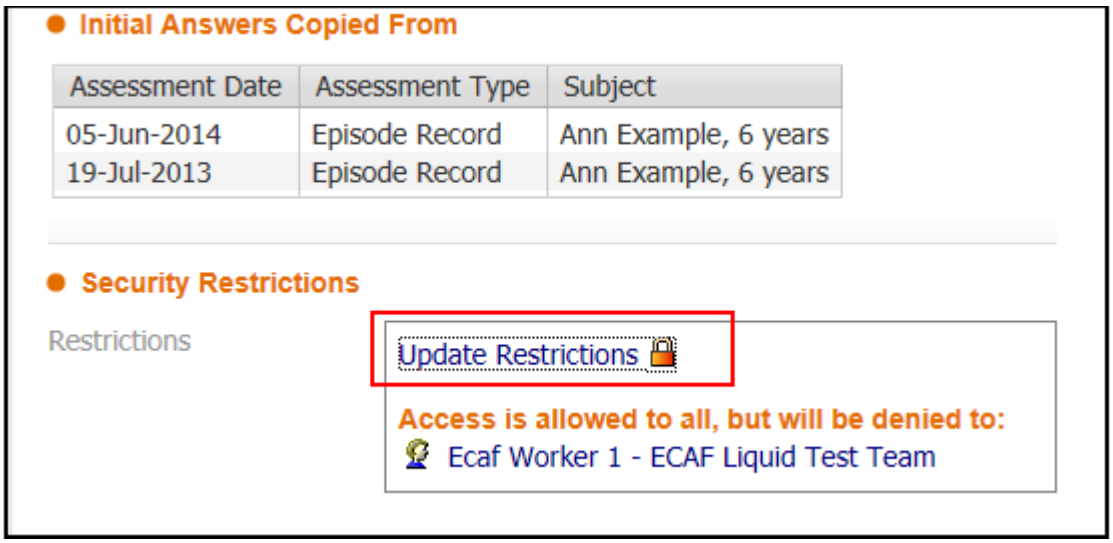
The information tab of the assessment form will be updated with a closed padlock icon indicating to whom access is denied or restricted to:



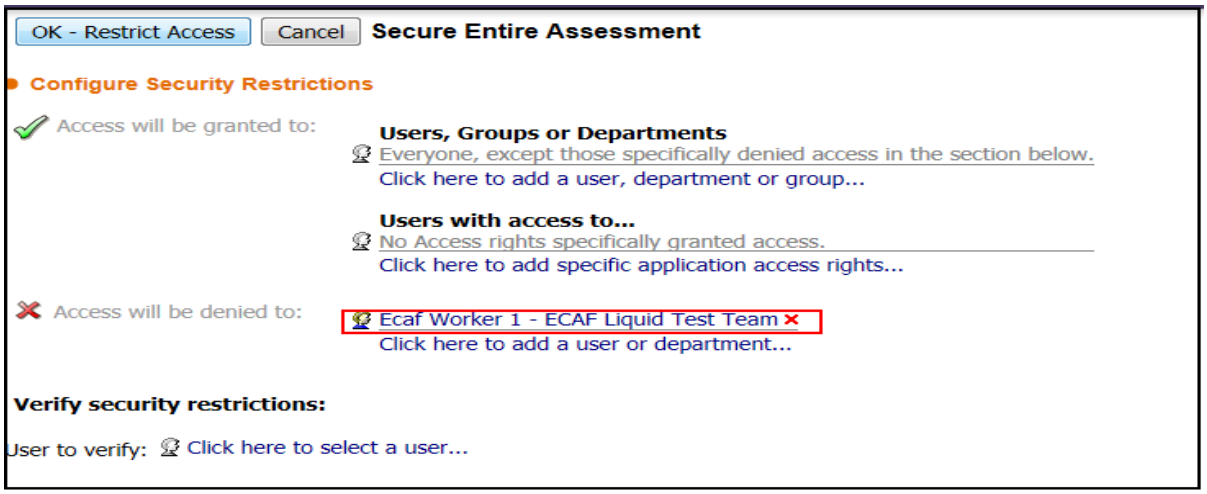

***Unlocking an Entire Assessment***

If you are the Lead Operator (specified on the Information Tab) of the assessment you can update the security restrictions in place prior to finalising the assessment.

1. Click **Update Restrictions** on the Information tab




2. Click the ✖ against the user/team from whom you wish to remove the security restriction from and then click **OK – Restrict Access**


OK - Restrict Access
Cancel
Secure Entire Assessment
Configure Security Restrictions
Access will be granted to:
Users, Groups or Departments
Everyone, except those specifically denied access in the section below.
Click here to add a user, department or group...
Users with access to...
No Access rights specifically granted access.
Click here to add specific application access rights...
Access will be denied to:
Ecaf Worker 1 - ECAF Liquid Test Team
Click here to add a user or department...
Verify security restrictions:
User to verify:
Click here to select a user...

The information tab of the assessment form will now illustrate that the form contains no security restrictions by showing the open padlock:

## CAF Assessment Tab

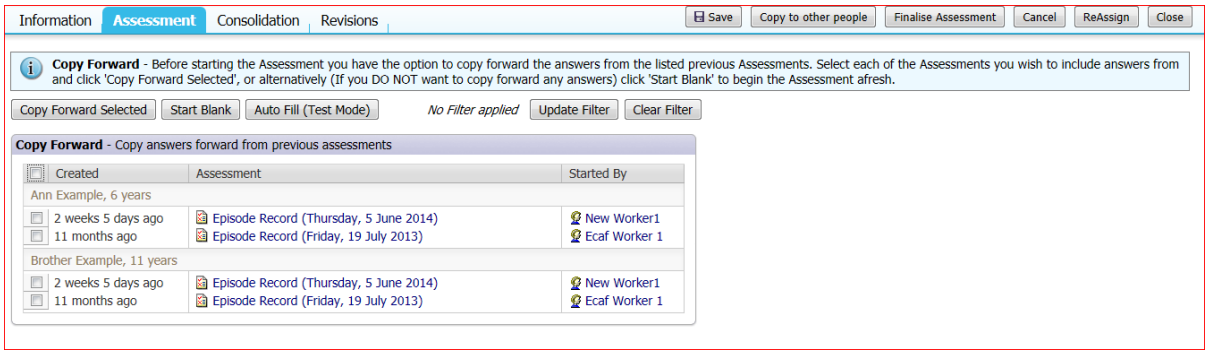
The CAF Form tab will display two options when starting a CAF assessment which is assigned to you: **Copy Forward Selected** and **Start Blank**

**Copy Forward Selected** enables the user to copy previous assessment(s) answers into the current assessment. Any information that is copied forward can then be amended accordingly. If a **Blank Assessment** is started no previous answers are carried forward.

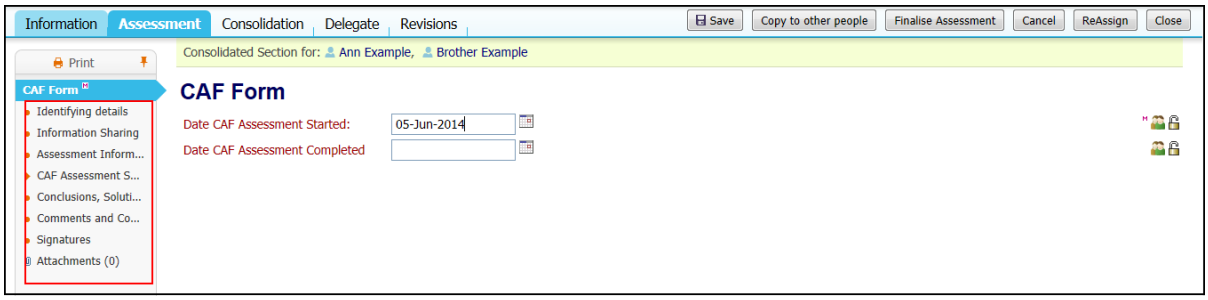
1. Click **Start Blank**

**OR**

Select the relevant checkboxes to specify which previous assessments to copy forward from and then click the **Copy Forward Selected** button

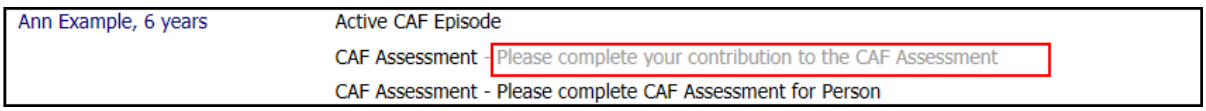

Information
Assessment
Consolidation
Revisions
Save
Copy to other people
Finalise Assessment
Cancel
ReAssign
Close
Copy Forward - Before starting the Assessment you have the option to copy forward the answers from the listed previous Assessments. Select each of the Assessments you wish to include answers from and click 'Copy Forward Selected', or alternatively (If you DO NOT want to copy forward any answers) click 'Start Blank' to begin the Assessment afresh.
Copy Forward Selected
Start Blank
Auto Fill (Test Mode)
No Filter applied
Update Filter
Clear Filter
Copy Forward - Copy answers forward from previous assessments
Created
Assessment
Started By
Ann Example, 6 years
2 weeks 5 days ago
Episode Record (Thursday, 5 June 2014)
New Worker1
11 months ago
Episode Record (Friday, 19 July 2013)
Ecaf Worker 1
Brother Example, 11 years
2 weeks 5 days ago
Episode Record (Thursday, 5 June 2014)
New Worker1
11 months ago
Episode Record (Friday, 19 July 2013)
Ecaf Worker 1

2. Use the sections (or headings) on the left hand side to navigate to different parts of the assessment form
3. Click **Save Changes** to save the assessment

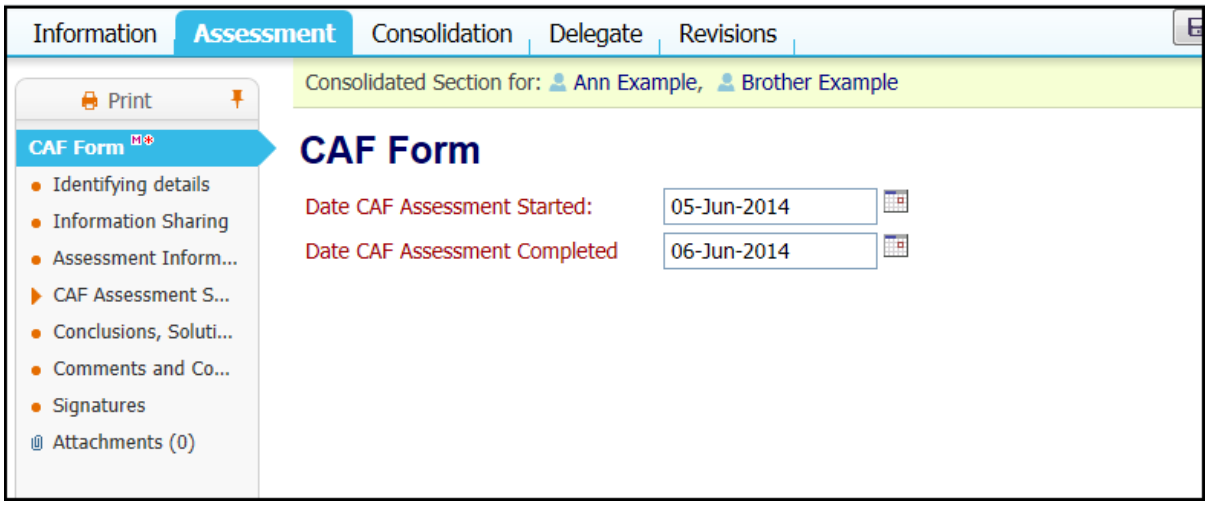



**TIP**: The assessment will remain as an open task on the home page until it is finalised.

4. Click on the **CAF Assessment – Please complete your contribution to the CAF Assessment** task description from the worktray to return to a CAF Assessment in progress


Ann Example, 6 years
Active CAF Episode
CAF Assessment - Please complete your contribution to the CAF Assessment
CAF Assessment - Please complete CAF Assessment for Person

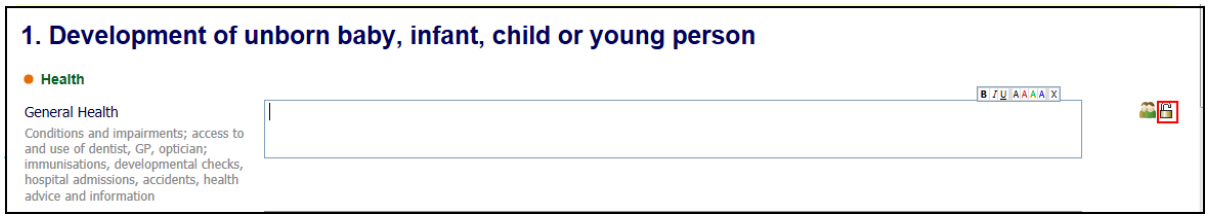
The assessment will be displayed on screen will all information previous saved:




### *Locking Assessment Questions*

In addition to securing an entire assessment the user also has the ability to secure individual answers within the assessment form. This will hide the answers to the selected questions from the specified individuals, teams, groups or departments who have been denied access

1. Click the **Padlock** Icon, found on the right-hand side of the question you wish to restrict access to


1. Development of unborn baby, infant, child or young person
Health
General Health
Conditions and impairments; access to and use of dentist, GP, optician; immunisations, developmental checks, hospital admissions, accidents, health advice and information

2. To allow or deny access to an individual user, group or users or department click on **Click here to add a user or department** to the right of **Access with be granted to** or **Access will be denied to**, as required

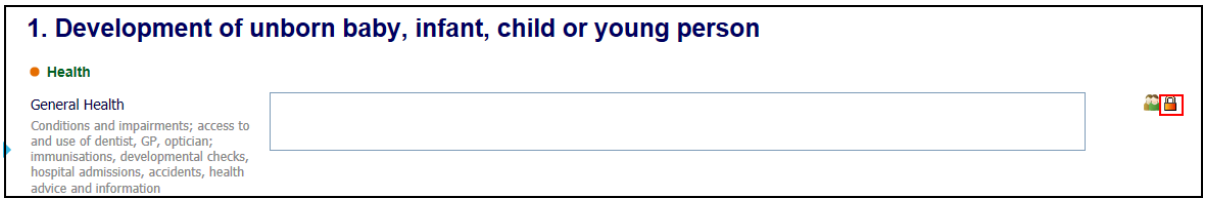
OK - Restrict Access
Cancel
General Health
Configure Security Restrictions
Access will be granted to:
Users, Groups or Departments
Everyone, except those specifically denied access in the section below.
Click here to add a user, department or group...
Users with access to...
No Access rights specifically granted access.
Click here to add specific application access rights...
Access will be denied to:
Ecaf Worker 1 - ECAF Liquid Test Team
Click here to add a user or department...

3. Browse for and select the user or department that should be specifically granted or denied access from the **Address Book**

**NOTE**: For further information on using the Address Book please refer to the **EHM General** Manual.

4. Once the user(s) or department have been selected click **OK – Restrict Access**

The question on the assessment form will now have a closed padlock indicating that security restrictions have been applied:

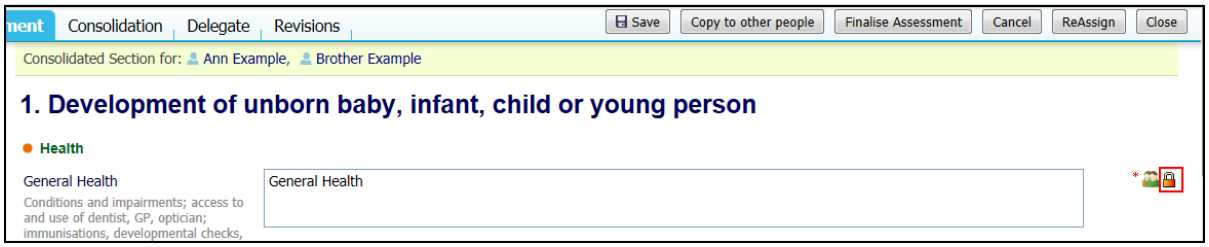

1. Development of unborn baby, infant, child or young person
Health
General Health
Conditions and impairments; access to and use of dentist, GP, optician; immunisations, developmental checks, hospital admissions, accidents, health advice and information

In this example, if the user (Ecaf Worker1) with a security restriction against them needs to view the answer to the restricted question they will be unable to do so as it will appear blank:

### *Unlocking Assessment Questions*

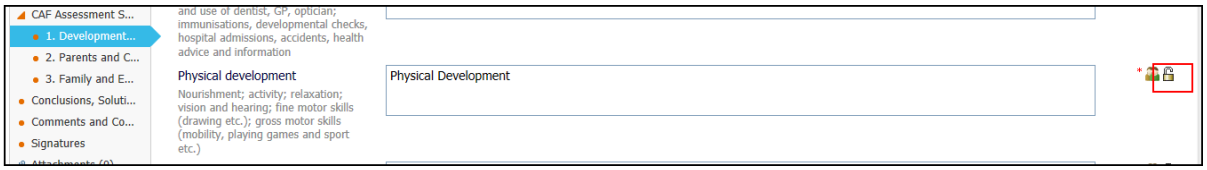
If you are the Lead Operator of the assessment you can update/remove the security restrictions in place prior to finalising the assessment.

1. Click the **Closed Padlock** Icon against the question you want to unlock




2. Click the ✖ against the user, group or department the restriction will be removed from and then click **OK – Restrict Access**

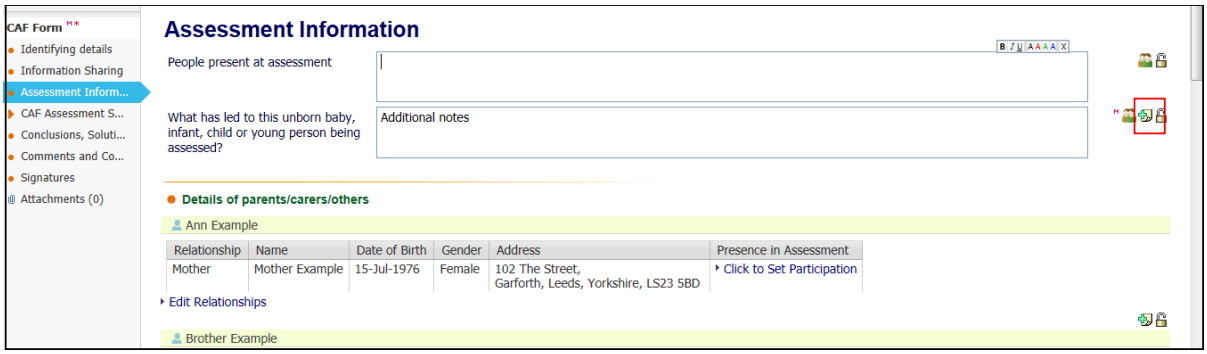
The question on the assessment form will now illustrate that the question contains no security restrictions by showing the open padlock.


CAF Assessment S...
1. Development...
2. Parents and C...
3. Family and E...
Conclusions, Soluti...
Comments and Co...
Signatures
and use of dentist, GP, optician; immunisations, developmental checks, hospital admissions, accidents, health advice and information
Physical development
Nourishment; activity; relaxation; vision and hearing; fine motor skills (drawing etc.); gross motor skills (mobility, playing games and sport etc.)
Physical Development

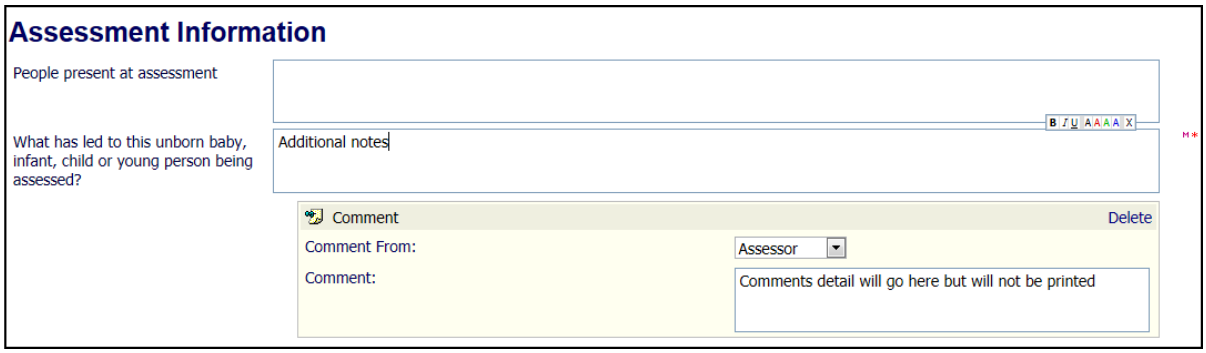
### *Comments*

Most of the fields within the assessment forms allow additional comments to be added. More than one comment can be added to any one question.

1. Click on the icon to the right of the question that you want to add the comment to

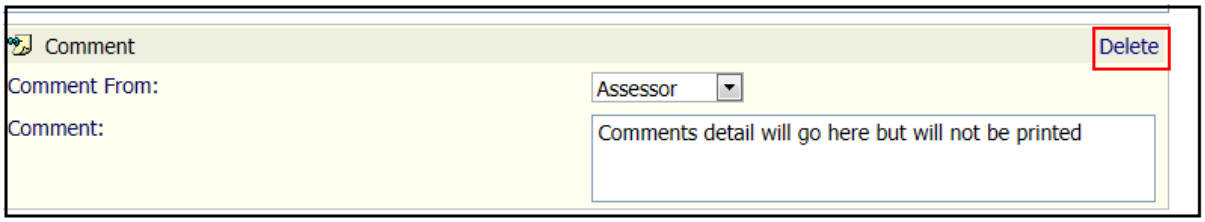



2. Enter **comment** details in the comments box displayed under the selected question




### *Deleting Comments from an Assessment*

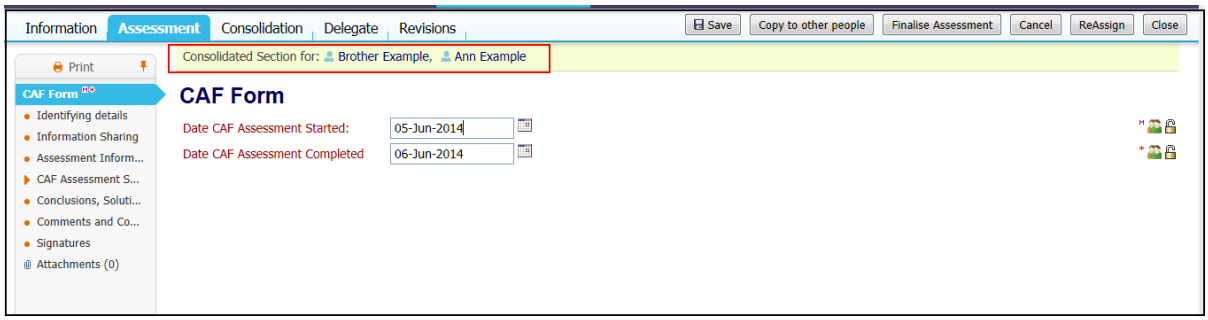
Select **Delete Comment** from within the comment box



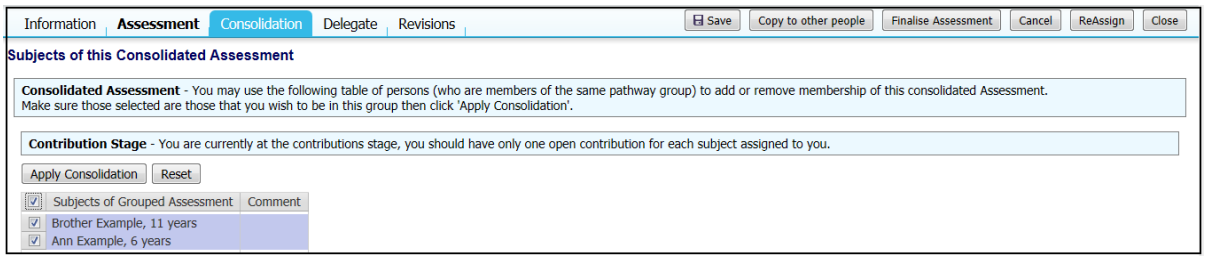
## Consolidated Assessments

A Combined assessment for multiple persons can be completed using consolidated assessment. Only one assessment is complete on multiple persons but is completed for both at the same time. The assessment will show as a combined assessment

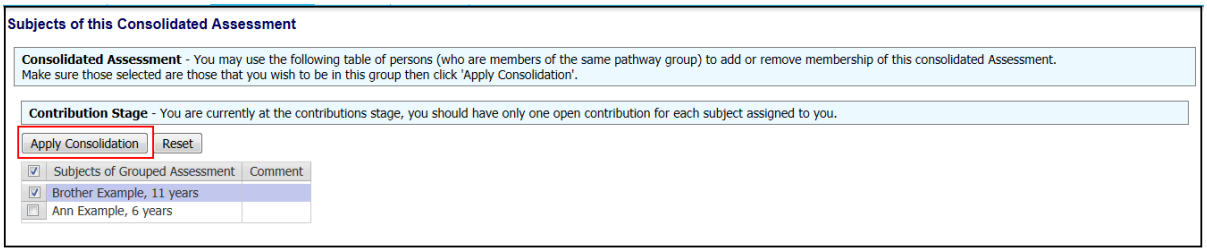
In this example, the assessment is combined for both children.



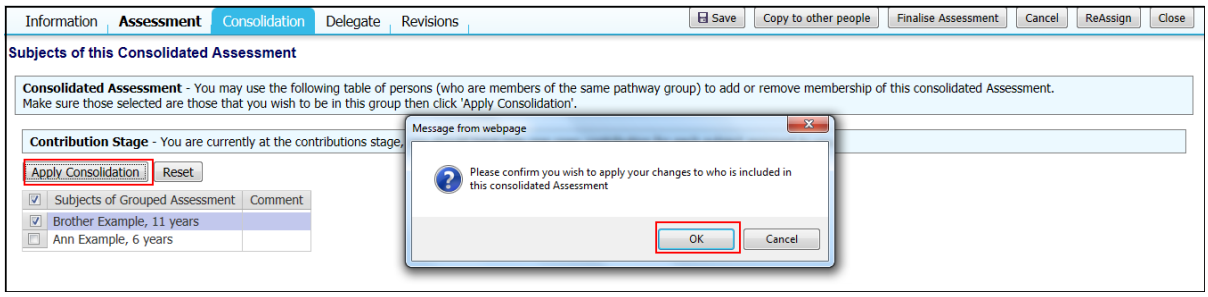

1. Click on the Consolidated tab to show the subjects for the assessment


Information
Assessment
Consolidation
Delegate
Revisions
Save
Copy to other people
Finalise Assessment
Cancel
ReAssign
Close
Subjects of this Consolidated Assessment
Consolidated Assessment - You may use the following table of persons (who are members of the same pathway group) to add or remove membership of this consolidated Assessment.
Make sure those selected are those that you wish to be in this group then click 'Apply Consolidation'.
Contribution Stage - You are currently at the contributions stage, you should have only one open contribution for each subject assigned to you.
Apply Consolidation
Reset
Subjects of Grouped Assessment
Comment
Brother Example, 11 years
Ann Example, 6 years

2. Uncheck the check box on any of the persons if you wish to create separate assessments for them.

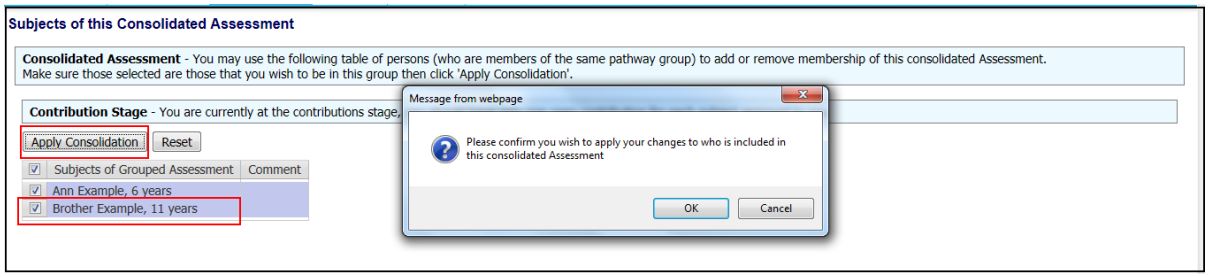

Subjects of this Consolidated Assessment
Consolidated Assessment - You may use the following table of persons (who are members of the same pathway group) to add or remove membership of this consolidated Assessment.
Make sure those selected are those that you wish to be in this group then click 'Apply Consolidation'.
Contribution Stage - You are currently at the contributions stage, you should have only one open contribution for each subject assigned to you.
Apply Consolidation
Reset
Subjects of Grouped Assessment
Comment
Brother Example, 11 years
Ann Example, 6 years

3. Click **OK** to confirm


Information
Assessment
Consolidation
Delegate
Revisions
Save
Copy to other people
Finalise Assessment
Cancel
ReAssign
Close
Subjects of this Consolidated Assessment
Consolidated Assessment - You may use the following table of persons (who are members of the same pathway group) to add or remove membership of this consolidated Assessment.
Make sure those selected are those that you wish to be in this group then click 'Apply Consolidation'.
Contribution Stage - You are currently at the contributions stage,
Apply Consolidation
Reset
Subjects of Grouped Assessment
Comment
Brother Example, 11 years
Ann Example, 6 years
Message from webpage
Please confirm you wish to apply your changes to who is included in this consolidated Assessment
OK
Cancel

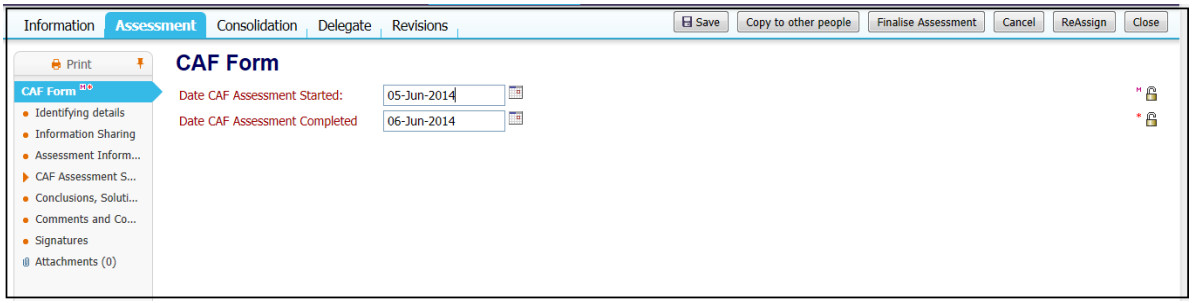
**Note:** you will need to complete separate assessment for each person that is removed from the Consolidated assessment

To combined the assessment Click on consolidation tab and select the check box for the persons to be included in the assessment.


Subjects of this Consolidated Assessment
Consolidated Assessment - You may use the following table of persons (who are members of the same pathway group) to add or remove membership of this consolidated Assessment.
Make sure those selected are those that you wish to be in this group then click 'Apply Consolidation'.
Contribution Stage - You are currently at the contributions stage,
Apply Consolidation
Reset
Subjects of Grouped Assessment
Comment
Ann Example, 6 years
Brother Example, 11 years
Message from webpage
Please confirm you wish to apply your changes to who is included in this consolidated Assessment
OK
Cancel

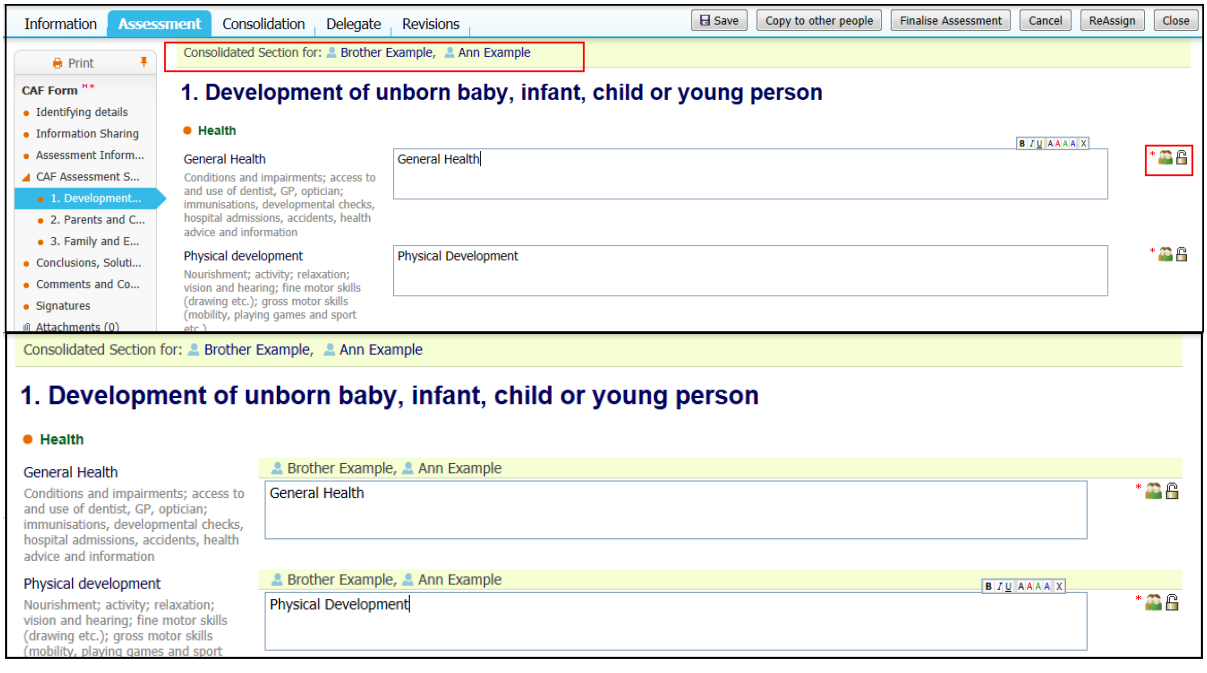
The example below show consolidated assessment

The example below shows an unconsolidated assessment



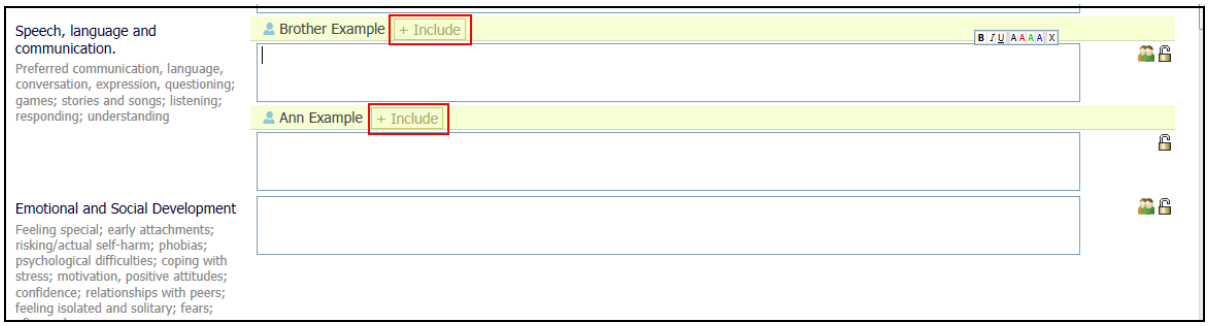

It is possible to record different answers for different persons in a combine assessment.

1. Select to toggle between subjects

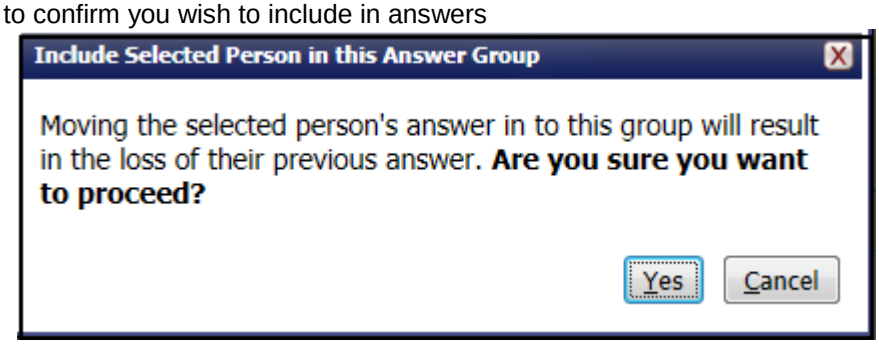

Information
Assessment
Consolidation
Delegate
Revisions
Save
Copy to other people
Finalise Assessment
Cancel
ReAssign
Close
Consolidated Section for: Brother Example, Ann Example
1. Development of unborn baby, infant, child or young person
Health
General Health
Conditions and impairments; access to and use of dentist, GP, optician; immunisations, developmental checks, hospital admissions, accidents, health advice and information
General Health
Physical development
Nourishment; activity; relaxation; vision and hearing; fine motor skills (drawing etc.); gross motor skills (mobility, playing games and sport
Physical Development
Brother Example, Ann Example

2. Click on the name of each person to separate the answers

3. Individual answers can now be recorded for each person.
4. Click on **Include and the name of the subject** to record a combined answer for all involved


Speech, language and communication.
Preferred communication, language, conversation, expression, questioning; games; stories and songs; listening; responding; understanding
Brother Example
+ Include
Ann Example
+ Include
Emotional and Social Development
Feeling special; early attachments; risking/actual self-harm; phobias; psychological difficulties; coping with stress; motivation, positive attitudes; confidence; relationships with peers; feeling isolated and solitary; fears;

5. Click ok to confirm you wish to include in answers

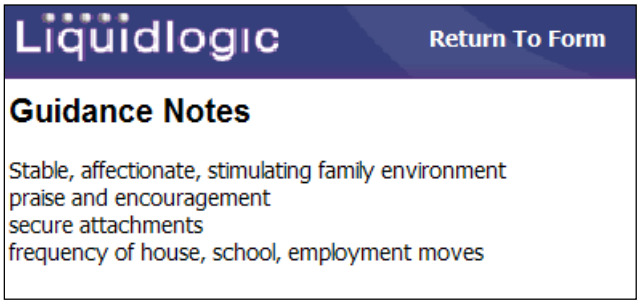

Include Selected Person in this Answer Group
Moving the selected person's answer in to this group will result in the loss of their previous answer. Are you sure you want to proceed?
Yes
Cancel

### *Viewing Help Text*

Text the questions/fields within the CAF assessment form have help text available to view

1. Hover the mouse over the Icon to display the guidance on screen for a few seconds

**TIP**: Alternatively click the Icon to view the help text on a full screen

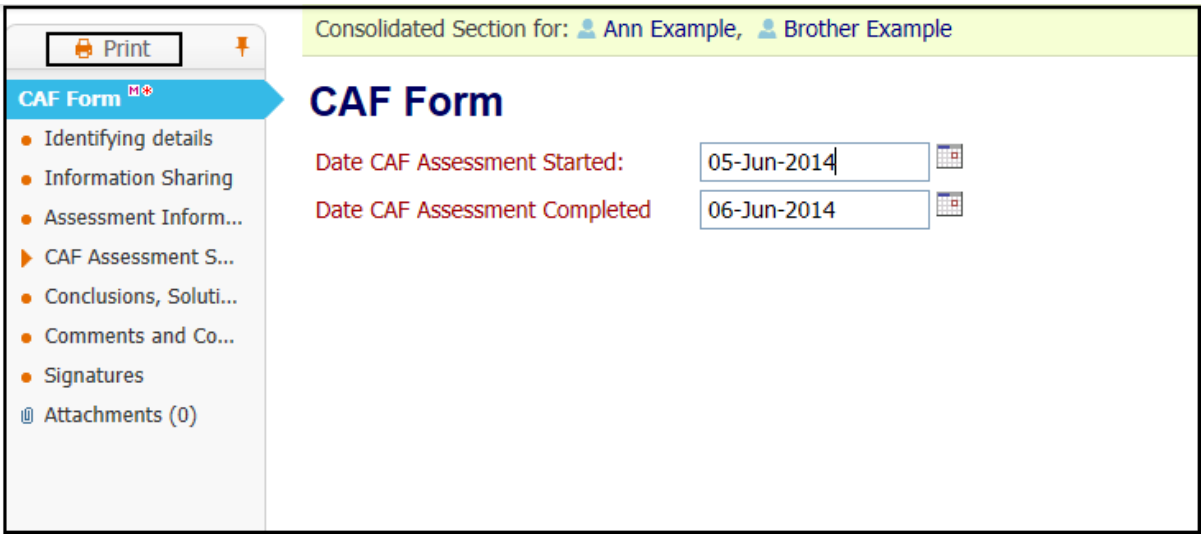



2. Click **Return to Form** after viewing the help text to return to the assessment.

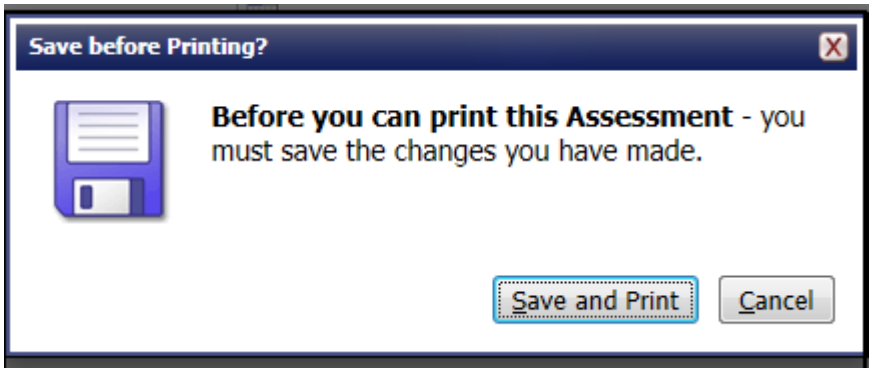
### *Printable View*

A printable view of the assessment is accessible from the CAF Form tab, located above the sections (or headings) on the left hand side.

1. Click **Print** ensuring that the assessment has been saved first

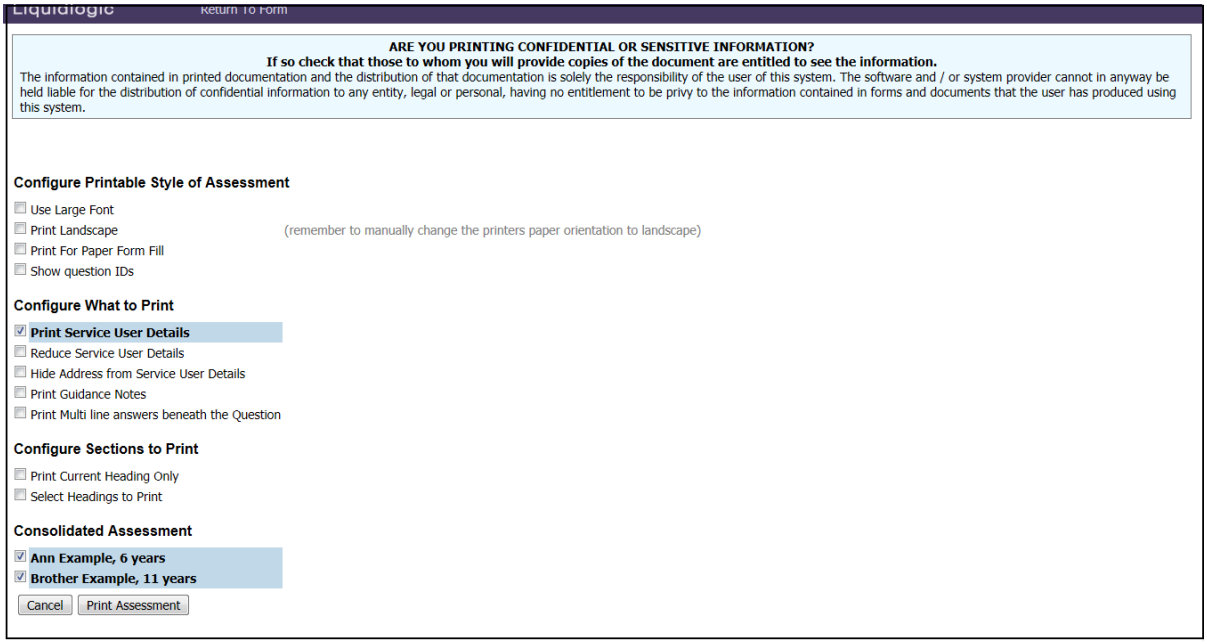


2. The following prompt will appear if you have not saved the changes in your CAF assessment

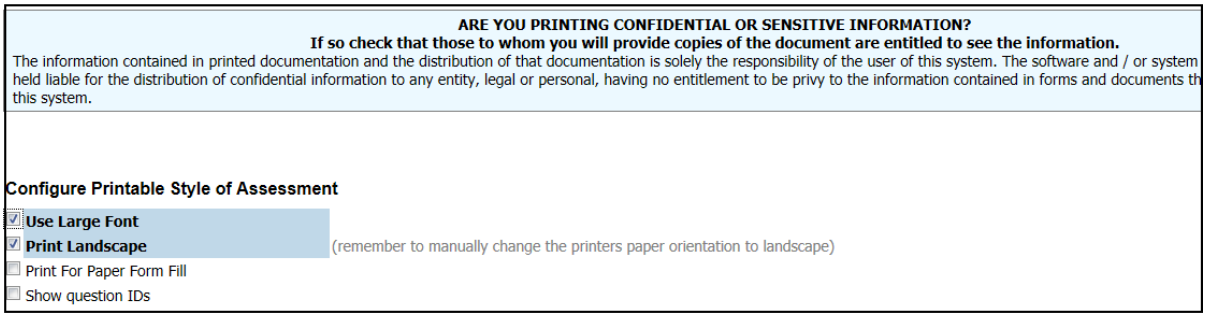



3. Click **Save and Print**

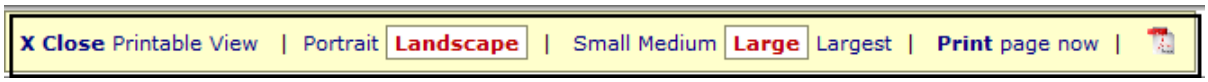
The following printing options are displayed:


Liquidlogic
Return To Form
ARE YOU PRINTING CONFIDENTIAL OR SENSITIVE INFORMATION?
If so check that those to whom you will provide copies of the document are entitled to see the information.
The information contained in printed documentation and the distribution of that documentation is solely the responsibility of the user of this system. The software and / or system provider cannot in anyway be held liable for the distribution of confidential information to any entity, legal or personal, having no entitlement to be privy to the information contained in forms and documents that the user has produced using this system.
Configure Printable Style of Assessment
Use Large Font
Print Landscape
(remember to manually change the printers paper orientation to landscape)
Print For Paper Form Fill
Show question IDs
Configure What to Print
Print Service User Details
Reduce Service User Details
Hide Address from Service User Details
Print Guidance Notes
Print Multi line answers beneath the Question
Configure Sections to Print
Print Current Heading Only
Select Headings to Print
Consolidated Assessment
Ann Example, 6 years
Brother Example, 11 years
Cancel
Print Assessment

4. Select the **Use Large Font** check box to print the assessment in a large font and then click **Print Assessment**


ARE YOU PRINTING CONFIDENTIAL OR SENSITIVE INFORMATION?
If so check that those to whom you will provide copies of the document are entitled to see the information.
The information contained in printed documentation and the distribution of that documentation is solely the responsibility of the user of this system. The software and / or system
held liable for the distribution of confidential information to any entity, legal or personal, having no entitlement to be privy to the information contained in forms and documents th
this system.
Configure Printable Style of Assessment
Use Large Font
Print Landscape
(remember to manually change the printers paper orientation to landscape)
Print For Paper Form Fill
Show question IDs

**TIP**: From the Printable View, use the **Small**, **Medium**, **Large** and **Largest** buttons to toggle the font size:

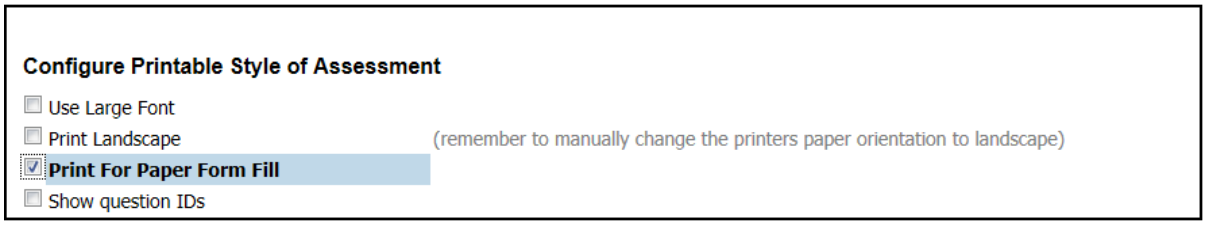



5. Select the **Print Landscape** check box and click **Print Assessment** to print a form in a landscape format

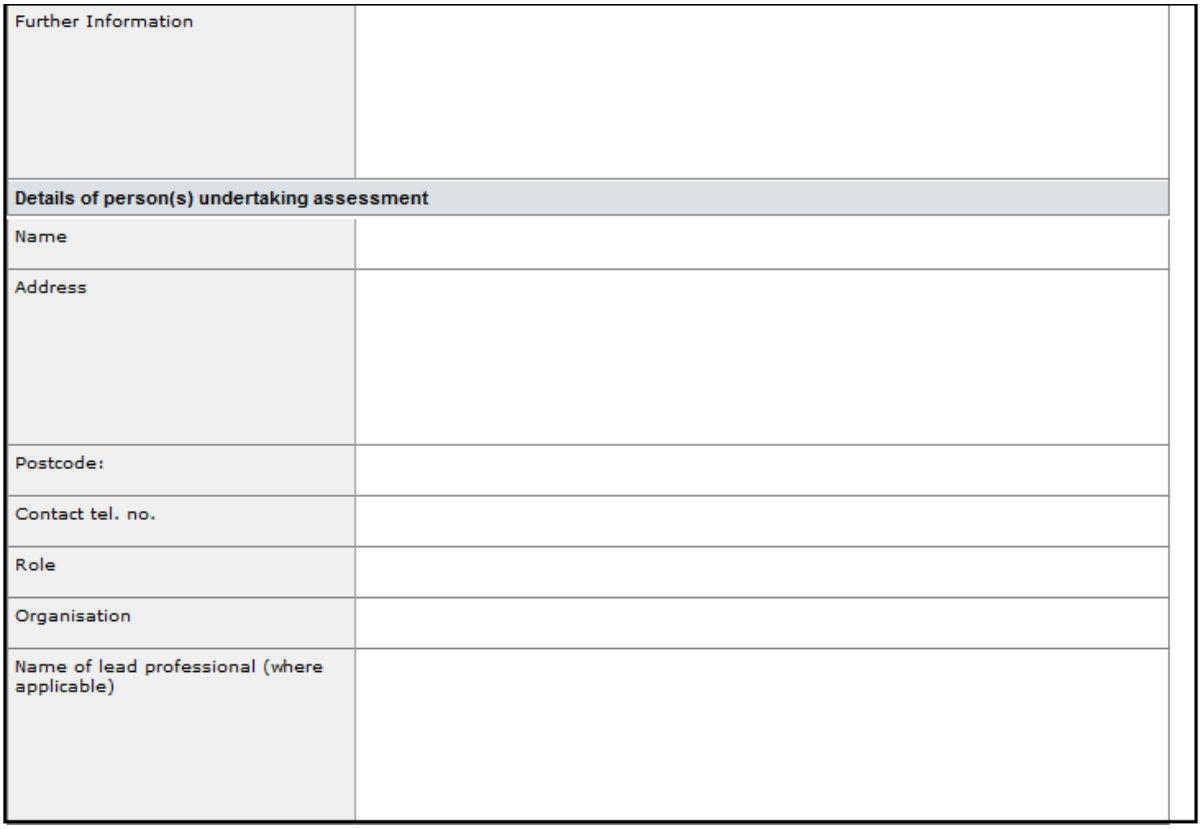
**NOTE**: If the landscape format is chosen you will need to change you printer's paper orientation to landscape.

**TIP**: Use the **Portrait** or **Landscape** Orientation buttons to toggle this setting

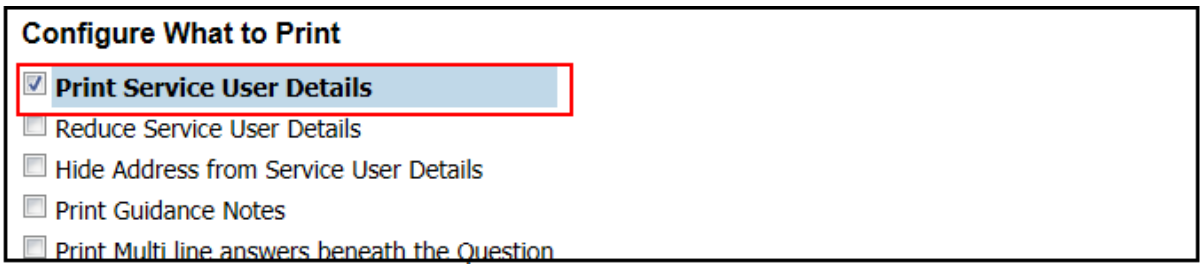
6. Select the **Print for Paper Form Fill** check box to increase the size of text boxes in the printable output to facilitate more room if completing this form using a paper-based copy and click **Print Assessment**


Configure Printable Style of Assessment
Use Large Font
Print Landscape
(remember to manually change the printers paper orientation to landscape)
Print For Paper Form Fill
Show question IDs

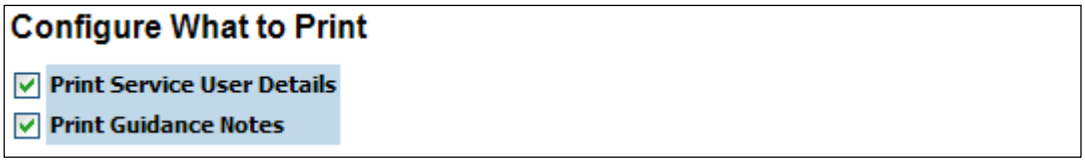
The example below shows the increased text box size allowing more room for paper based annotations:



The **Print Service User Details** printable view option will automatically display the child/young person's basic demographic details on the printable view.


Configure What to Print
Print Service User Details
Reduce Service User Details
Hide Address from Service User Details
Print Guidance Notes
Print Multi line answers beneath the Question

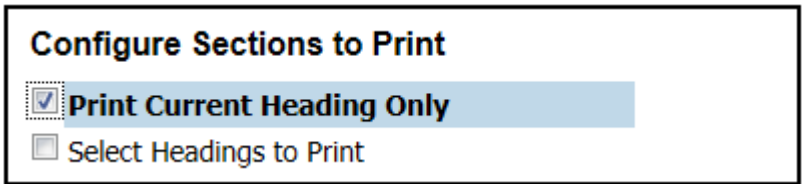
This option will be selected by default but can be disabled before clicking **Print Assessment** if required:



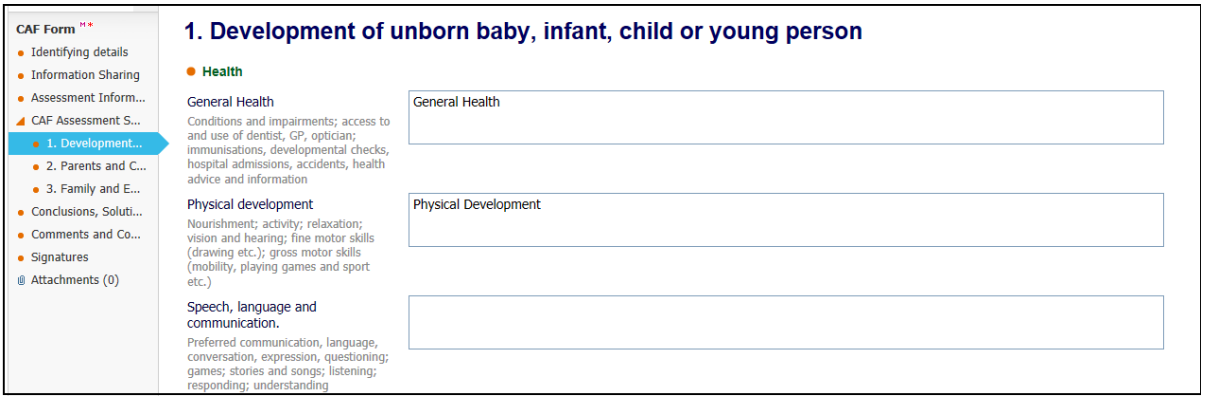

The **Print Guidance Notes** printable view option will include any instructions and guidance notes within the printed output. This option will be selected by default but can be disabled before clicking **Print Assessment** if required:

A user can also specify which particular sections of the assessment they wish to print.

7. Select the **Print Current Heading Only** checkbox from the Printable View options and then click **Print Assessment** to ensure that only the selected section of the form, (i.e. the section on the left highlighted in blue) will appear on the printed output

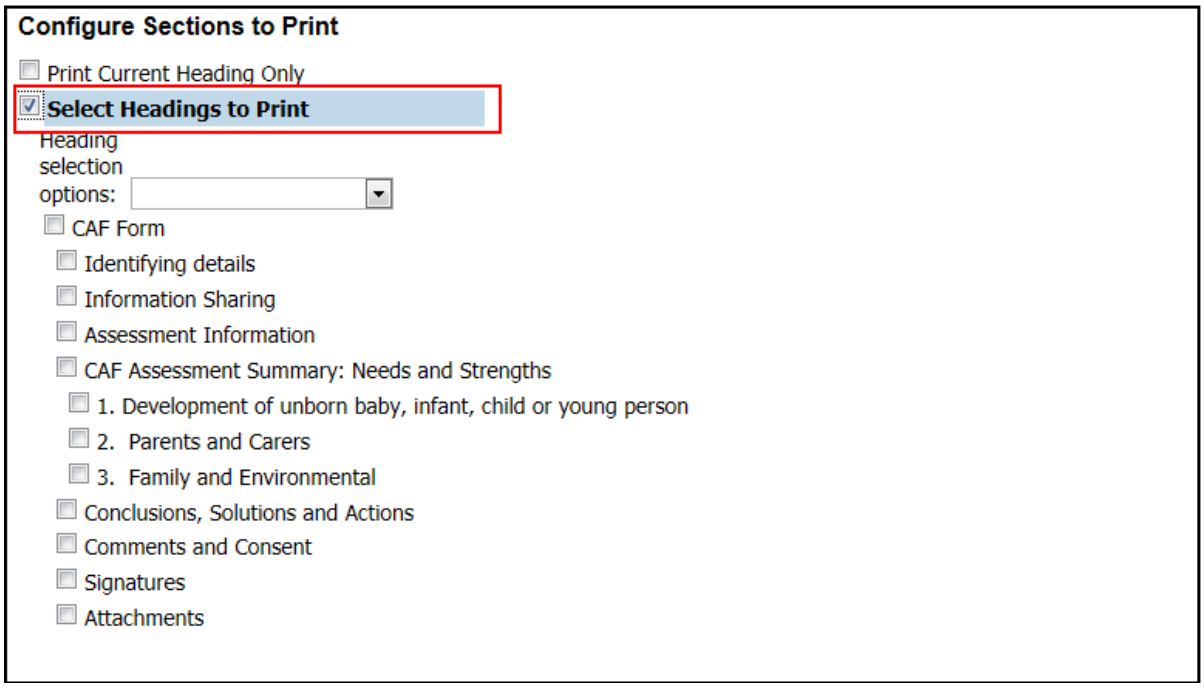



For example; the user may only wish to print the selected section 'Development of unborn baby, infant , child or young person' from the assessment.


CAF Form **
Identifying details
Information Sharing
Assessment Inform...
CAF Assessment S...
1. Development...
2. Parents and C...
3. Family and E...
Conclusions, Soluti...
Comments and Co...
Signatures
Attachments (0)
1. Development of unborn baby, infant, child or young person
Health
General Health
Conditions and impairments; access to and use of dentist, GP, optician; immunisations, developmental checks, hospital admissions, accidents, health advice and information
General Health
Physical development
Nourishment; activity; relaxation; vision and hearing; fine motor skills (drawing etc.); gross motor skills (mobility, playing games and sport etc.)
Physical Development
Speech, language and communication.
Preferred communication, language, conversation, expression, questioning; games; stories and songs; listening; responding; understanding

8. Alternatively from the Printable View options choose the **Select Headings to Print** check box. This will allow the user to select individual sections of the form they wish to print instead of the entire assessment

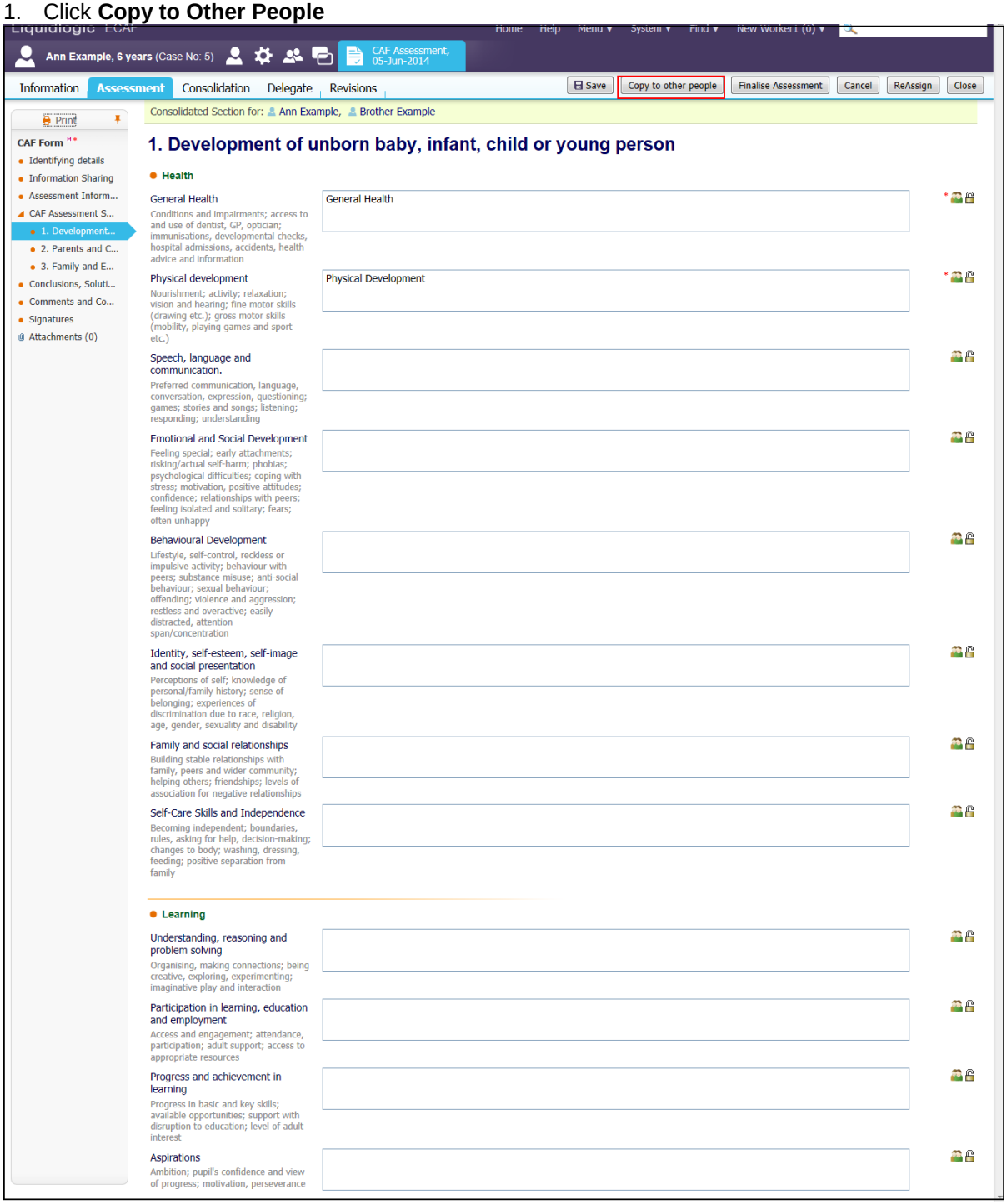
9. Use the checkboxes to specify which sections of the assessment to print and then click the **Print Assessment** button


Configure Sections to Print
Print Current Heading Only
Select Headings to Print
Heading selection options:
CAF Form
Identifying details
Information Sharing
Assessment Information
CAF Assessment Summary: Needs and Strengths
1. Development of unborn baby, infant, child or young person
2. Parents and Carers
3. Family and Environmental
Conclusions, Solutions and Actions
Comments and Consent
Signatures
Attachments

## *Copy to Other People*

If appropriate, the CAF Assessment can be copied sideways to siblings of the child in question.

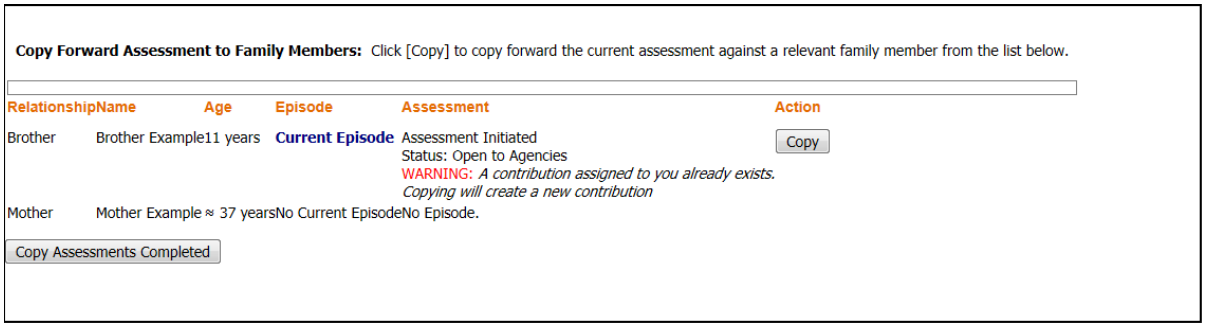
1. Click **Copy to Other People**


Ann Example, 6 years (Case No: 5)
CAF Assessment, 05-Jun-2014
Information
Assessment
Consolidation
Delegate
Revisions
Save
Copy to other people
Finalise Assessment
Cancel
ReAssign
Close
Print
CAF Form
Identifying details
Information Sharing
Assessment Inform...
CAF Assessment S...
1. Development...
2. Parents and C...
3. Family and E...
Conclusions, Soluti...
Comments and Co...
Signatures
Attachments (0)
Consolidated Section for: Ann Example, Brother Example
1. Development of unborn baby, infant, child or young person
Health
General Health
Conditions and impairments; access to and use of dentist, GP, optician; immunisations, developmental checks, hospital admissions, accidents, health advice and information
General Health
Physical development
Nourishment; activity; relaxation; vision and hearing; fine motor skills (drawing etc.); gross motor skills (mobility, playing games and sport etc.)
Physical Development
Speech, language and communication.
Preferred communication, language, conversation, expression, questioning; games; stories and songs; listening; responding; understanding
Emotional and Social Development
Feeling special; early attachments; risking/actual self-harm; phobias; psychological difficulties; coping with stress; motivation, positive attitudes; confidence; relationships with peers; feeling isolated and solitary; fears; often unhappy
Behavioural Development
Lifestyle, self-control, reckless or impulsive activity; behaviour with peers; substance misuse; anti-social behaviour; sexual behaviour; offending; violence and aggression; restless and overactive; easily distracted, attention span/concentration
Identity, self-esteem, self-image and social presentation
Perceptions of self; knowledge of personal/family history; sense of belonging; experiences of discrimination due to race, religion, age, gender, sexuality and disability
Family and social relationships
Building stable relationships with family, peers and wider community; helping others; friendships; levels of association for negative relationships
Self-Care Skills and Independence
Becoming independent; boundaries, rules, asking for help, decision-making; changes to body; washing, dressing, feeding; positive separation from family
Learning
Understanding, reasoning and problem solving
Organising, making connections; being creative, exploring, experimenting; imaginative play and interaction
Participation in learning, education and employment
Access and engagement; attendance, participation; adult support; access to appropriate resources
Progress and achievement in learning
Progress in basic and key skills; available opportunities; support with disruption to education; level of adult interest
Aspirations
Ambition; pupil's confidence and view of progress; motivation, perseverance

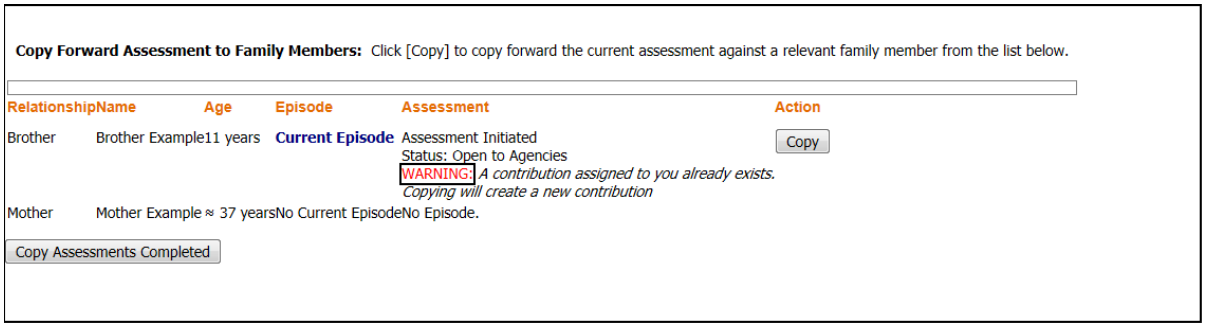
2. Click **OK** to confirm your action and to continue with copying the assessment to other people/siblings. Alternatively, click **Cancel** to return to the original child's assessment without copying to other people

**NOTE**: the sibling must be recorded within the Relationships tab of the child/young person's demographic record to facilitate this. The sibling(s) must also have a current EHM episode and the episode co-ordinator should have started the CAF assessment.

3. Click **Copy** for each of the relevant Family member/children
4. Click **OK** to confirm your action when prompted

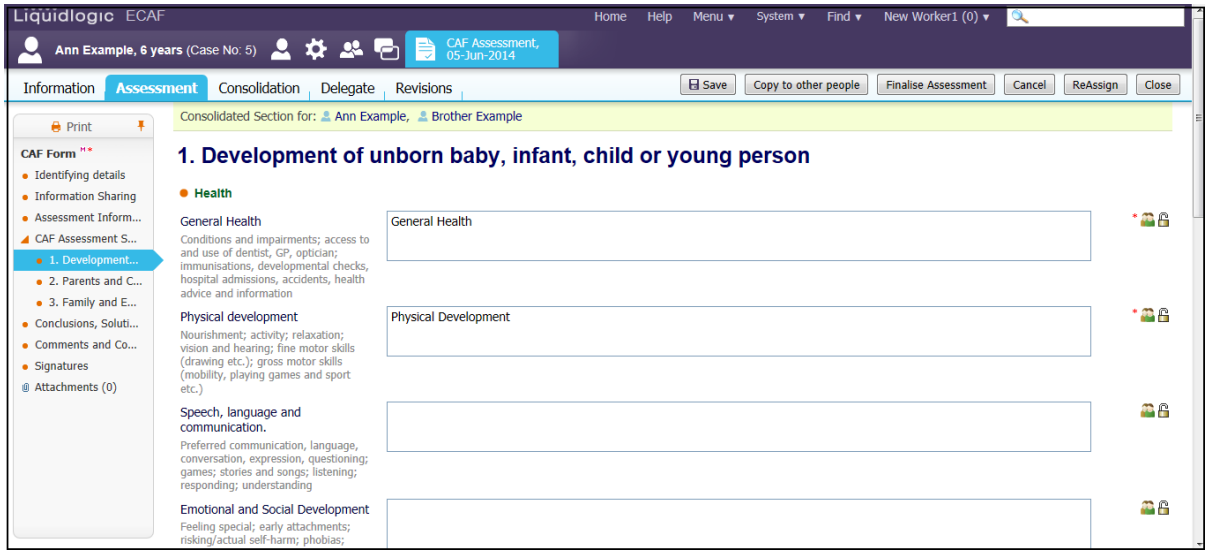

Copy Forward Assessment to Family Members: Click [Copy] to copy forward the current assessment against a relevant family member from the list below.
RelationshipName Age Episode Assessment Action
Brother Brother Example11 years Current Episode Assessment Initiated
Status: Open to Agencies
WARNING: A contribution assigned to you already exists.
Copying will create a new contribution
Copy
Mother Mother Example ≈ 37 years No Current Episode No Episode.
Copy Assessments Completed

Every time the **Copy** button is selected a new contribution will be created. Additional information regarding the assessment for the other children will show as a **warning**. The warning highlights that the original child's assessment contribution is assign to the current user and as a result of choosing to copy that assessment over to other children, the other children's assessments will be sent to the same user and the necessary tasks generated.

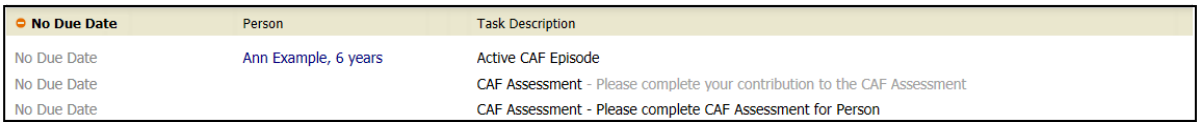

Copy Forward Assessment to Family Members: Click [Copy] to copy forward the current assessment against a relevant family member from the list below.
RelationshipName Age Episode Assessment Action
Brother Brother Example11 years Current Episode Assessment Initiated
Status: Open to Agencies
WARNING: A contribution assigned to you already exists.
Copying will create a new contribution
Copy
Mother Mother Example ≈ 37 years No Current Episode No Episode.
Copy Assessments Completed

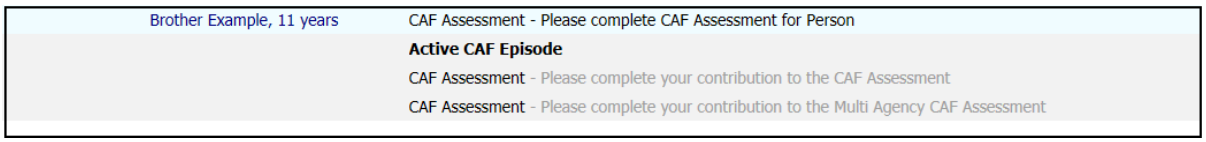
5. Once the assessment has been copied to any other children select **Copy Assessments Completed** and click **OK** to confirm

You will then be returned to the original child's CAF Assessment

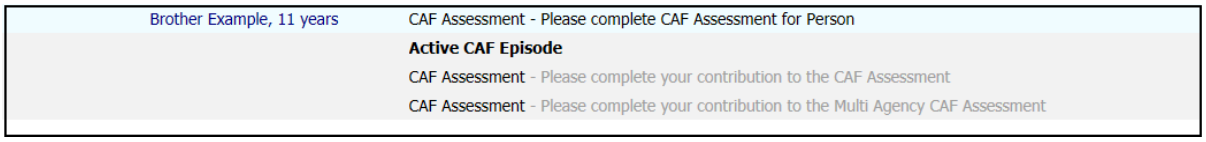

Liquidlogic ECAF
Home Help Menu System Find New Worker1 (0)
Ann Example, 6 years (Case No: 5)
CAF Assessment, 05-Jun-2014
Information Assessment Consolidation Delegate Revisions
Save Copy to other people Finalise Assessment Cancel ReAssign Close
Print
CAF Form
Identifying details
Information Sharing
Assessment Inform...
CAF Assessment S...
1. Development...
2. Parents and C...
3. Family and E...
Conclusions, Soluti...
Comments and Co...
Signatures
Attachments (0)
Consolidated Section for: Ann Example, Brother Example
1. Development of unborn baby, infant, child or young person
Health
General Health
Conditions and impairments; access to and use of dentist, GP, optician; immunisations, developmental checks, hospital admissions, accidents, health advice and information
General Health
Physical development
Nourishment; activity; relaxation; vision and hearing; fine motor skills (drawing etc.); gross motor skills (mobility, playing games and sport etc.)
Physical Development
Speech, language and communication.
Preferred communication, language, conversation, expression, questioning; games; stories and songs; listening; responding; understanding
Emotional and Social Development
Feeling special; early attachments; risking/actual self-harm; phobias;

New tasks will appear in your work tray in relation to the children the CAF assessment was copied to.


No Due Date
Person
Task Description
No Due Date
Ann Example, 6 years
Active CAF Episode
No Due Date
CAF Assessment - Please complete your contribution to the CAF Assessment
No Due Date
CAF Assessment - Please complete CAF Assessment for Person

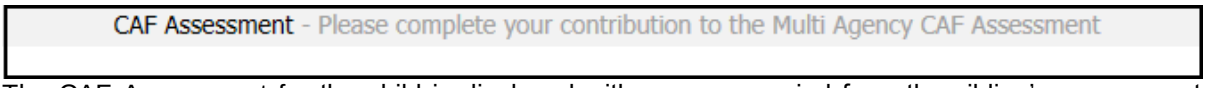

Brother Example, 11 years
CAF Assessment - Please complete CAF Assessment for Person
Active CAF Episode
CAF Assessment - Please complete your contribution to the CAF Assessment
CAF Assessment - Please complete your contribution to the Multi Agency CAF Assessment

**NOTE**: The episode coordinator for the other children will receive the following two tasks:

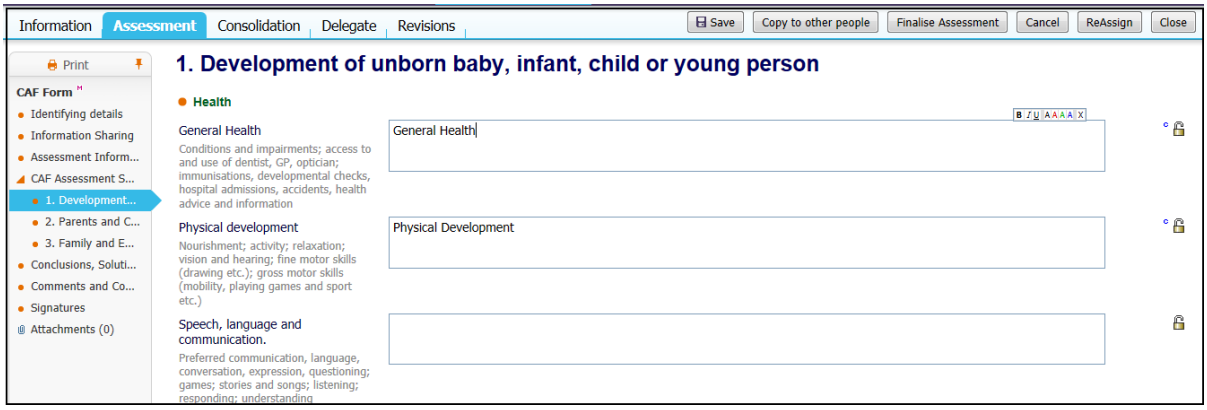

Brother Example, 11 years
CAF Assessment - Please complete CAF Assessment for Person
Active CAF Episode
CAF Assessment - Please complete your contribution to the CAF Assessment
CAF Assessment - Please complete your contribution to the Multi Agency CAF Assessment

If you are not the episode coordinator but have access to the episode under the current consent statement then you will only have the following task:

6. Select the task **'CAF Assessment – Please complete your contribution to the Multi Agency CAF Assessment'** for the child the original assessment was copied to



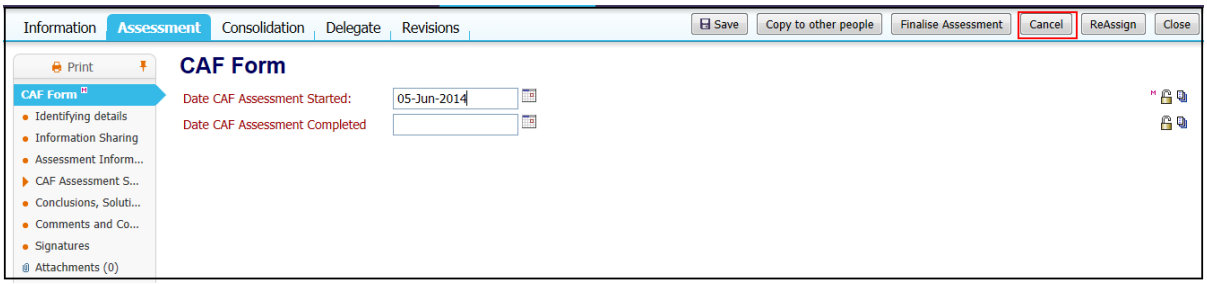

The CAF Assessment for the child is displayed with answers copied from the sibling's assessment indicated with a © . Although answers have been copied across the information can be amended.



## *Cancel Assessment*

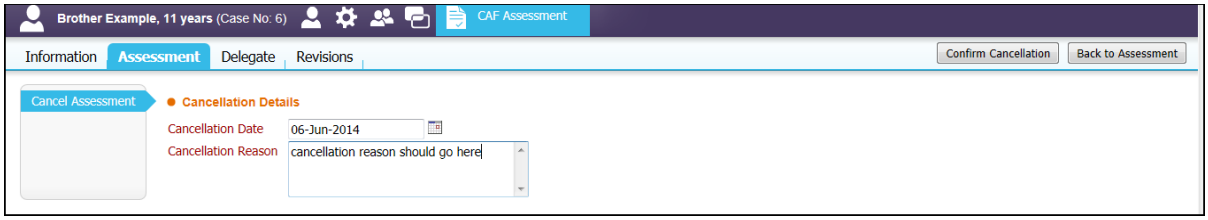
The facility to cancel assessments is only available to assessment contributors, an assessment can be cancelled at any time prior to being finalised, for example if started in error. The episode coordinator will not have the option to cancel the entire CAF episode for the child/young person.

1. Click **Cancel Assessment**




2. Enter **Cancellation Date** and **Reasons** and click **Confirm Cancellation** and then **OK**

**TIP**: Click **Back to Assessment** if you no longer wish to cancel the assessment

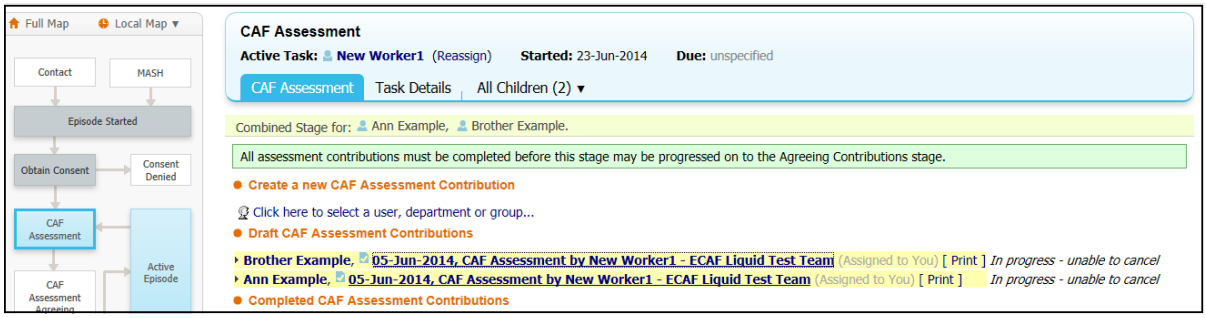



This will also remove the CAF assessment contribution task from the work tray.

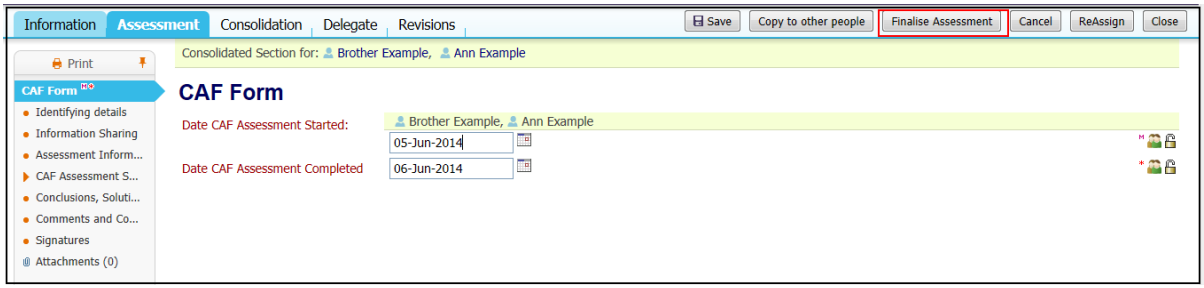
## *Finalise Assessment*

Each CAF Assessment contribution form **must be finalised** (or cancelled) by each assigned contributor in order to allow the Episode Coordinator to progress to the next stage in the process. The following example shows four contributions to the CAF Assessment. Only one these contributions have been completed, the remaining three are still in progress or not started:

**NOTE**: If the Episode Coordinator is the only user who is recording contributions to the CAF Assessment they must finalise their contribution before they are able to progress to the next stage.


Full Map
Local Map
Contact
MASH
Episode Started
Obtain Consent
Consent Denied
CAF Assessment
Active Episode
CAF Assessment
Active Task: New Worker1 (Reassign)
Started: 23-Jun-2014
Due: unspecified
CAF Assessment
Task Details
All Children (2)
Combined Stage for: Ann Example, Brother Example.
All assessment contributions must be completed before this stage may be progressed on to the Agreeing Contributions stage.
Create a new CAF Assessment Contribution
Click here to select a user, department or group...
Draft CAF Assessment Contributions
Brother Example, 05-Jun-2014, CAF Assessment by New Worker1 - ECAF Liquid Test Team (Assigned to You) [ Print ] In progress - unable to cancel
Ann Example, 05-Jun-2014, CAF Assessment by New Worker1 - ECAF Liquid Test Team (Assigned to You) [ Print ] In progress - unable to cancel
Completed CAF Assessment Contributions

1. Click **Finalise Assessment** and then **OK** to confirm



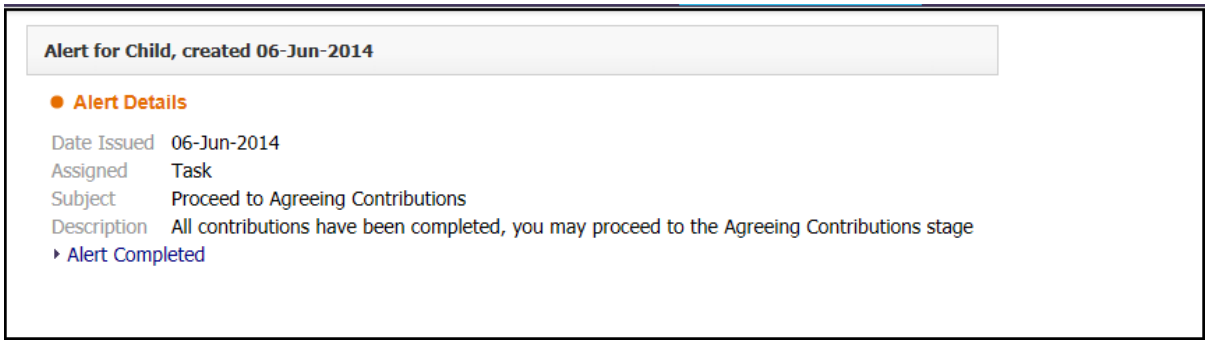

**NOTE**: Once an assessment is finalised it can no longer be edited

After this point you will not have the facility to return to the assessment to edit your answers.

The CAF Episode Coordinator will receive an alert in their work tray to indicate all assessment contributions have been completed and it is possible to proceed to the 'Agreeing Contributions' stage.

All
Empty
Worktray 4
ECAF Duty Te... 7
Group By: Date | Task | Person | Address | Locality Order By: Start Date | Due Date | Timeframe | Person
No Due Date
Person
Task Description
No Due Date
Ann Example, 6 years
Active CAF Episode
No Due Date
CAF Assessment - Please complete CAF Assessment for Person
No Due Date
Brother Example, 11 years
CAF Assessment - Please complete CAF Assessment for Person
No Due Date
Alerts for task CAF Assessment - Please complete CAF Assessment for Person
Proceed to Agreeing Contribu... - All contributions have been completed,... (Added 06-Jun-2014)
Proceed to Agreeing Contribu... - All contributions have been completed,... (Added 06-Jun-2014)

**TIP**: Click on the Alert to view the full details:


Alert for Child, created 06-Jun-2014
Alert Details
Date Issued 06-Jun-2014
Assigned Task
Subject Proceed to Agreeing Contributions
Description All contributions have been completed, you may proceed to the Agreeing Contributions stage
Alert Completed

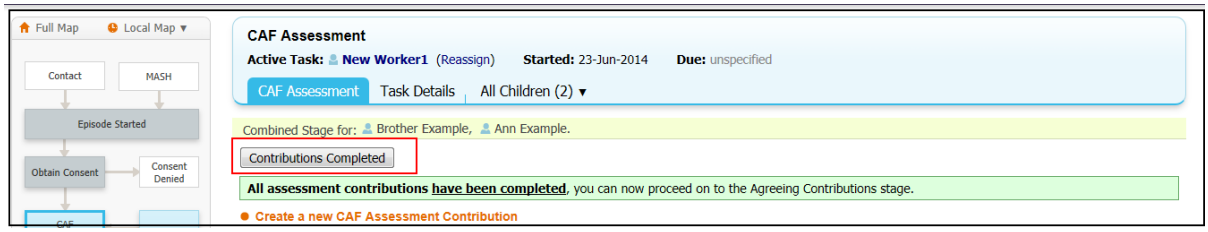
# Agreeing Contributions Stage

The following conditions would need to be met in order for the episode co-ordinator to complete the CAF assessment:-

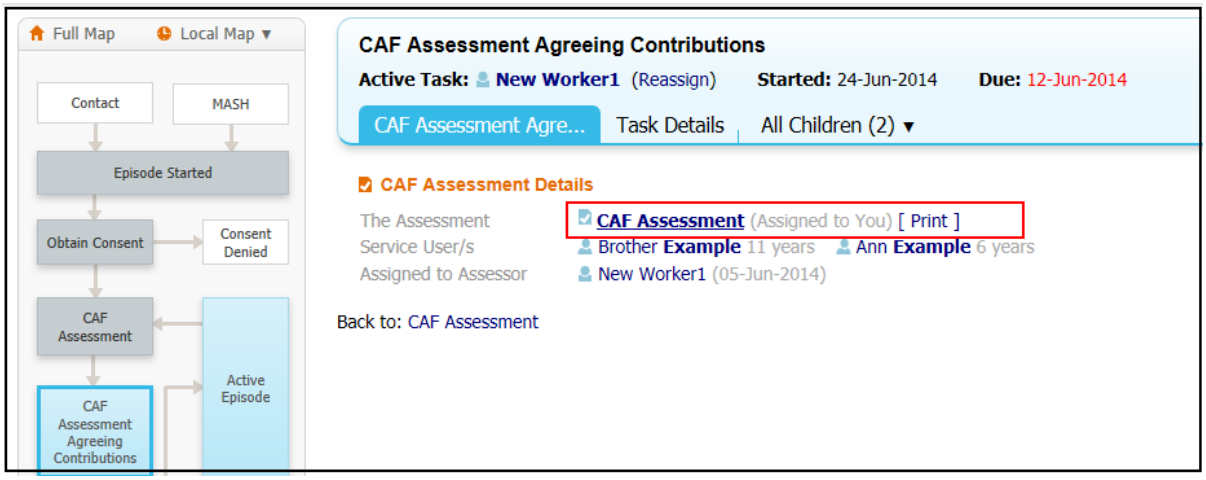
– The episode co-ordinator would need to be listed as a contributor to the CAF Assessment and the episode coordinator MUST finalise their own contribution.
– Once the episode co-ordinator has recorded a contribution they would need to either proceed to the 'Agreeing Contributions' stage or allocate a EHM user or a number of users to contribute to the CAF assessment, allocate the user the right to contribute to the assessment and then await all contributors to finalise their individual assessment contributions.

**NOTE**: To create a new assessment contribution, please refer to the **CAF Assessment Contributions** section in this document.

1. Click **Contributions Completed** and click **OK** to confirm

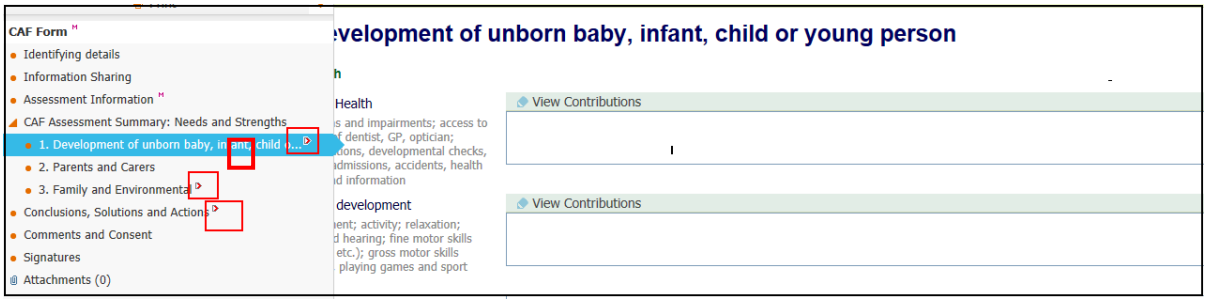



2. Select the **hyperlink** for the CAF Assessment to agree and merge all contributions (even if there has only been a single contribution recorded)

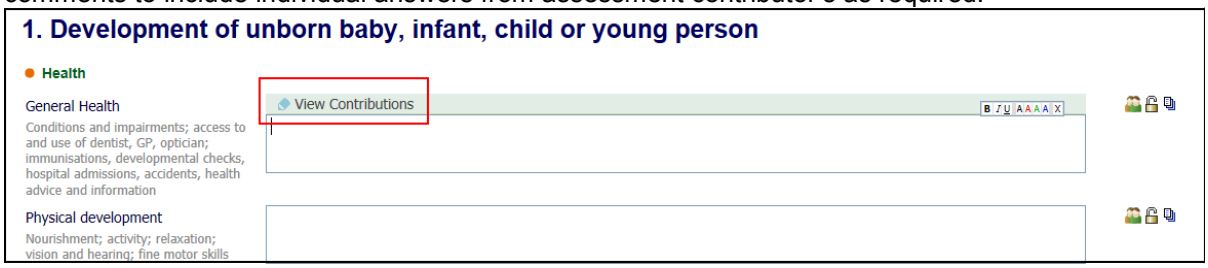



Alternatively, click on the task from the worktray to navigate to the 'CAF Assessment Agreeing Contributions' stage:

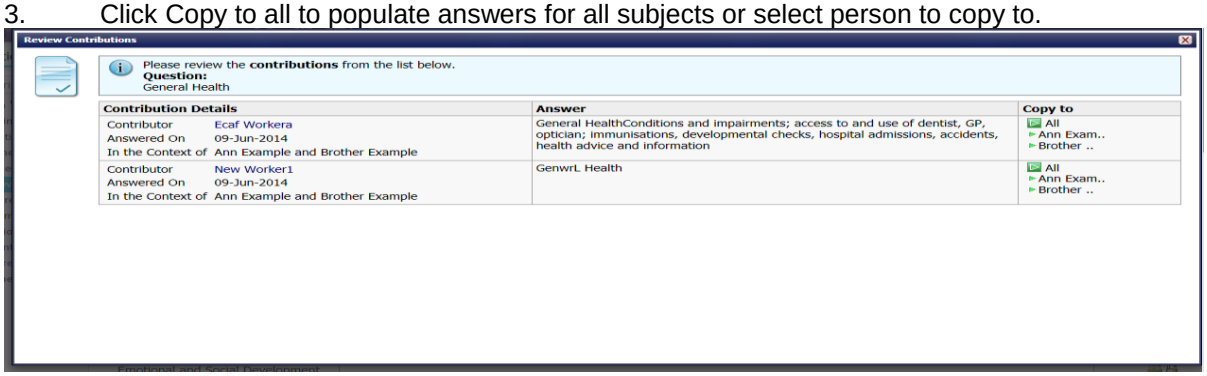
The CAF Assessment form will be displayed including all contributions. Answers entered by each individual assessment contributor can be identified by selecting sections indicated with a symbol.



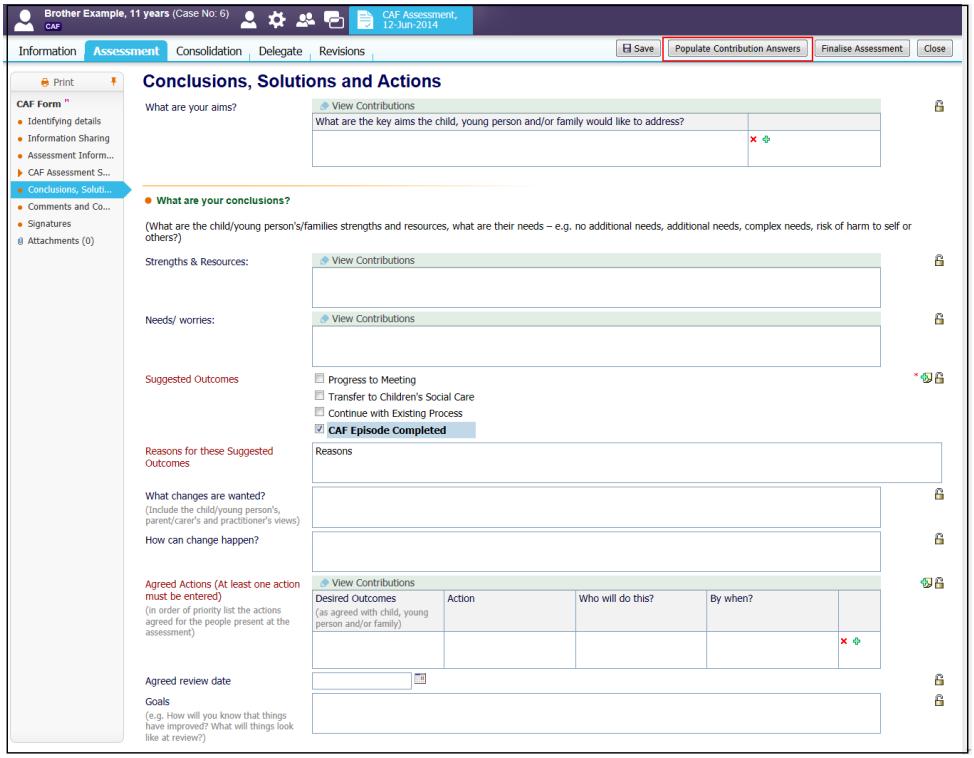

**TIP**: Alternatively click the View Contributions icon against the appropriate contributor's comments to include individual answers from assessment contributor's as required.


1. Development of unborn baby, infant, child or young person
Health
General Health
Conditions and impairments; access to and use of dentist, GP, optician; immunisations, developmental checks, hospital admissions, accidents, health advice and information
View Contributions
Physical development
Nourishment; activity; relaxation; vision and hearing; fine motor skills

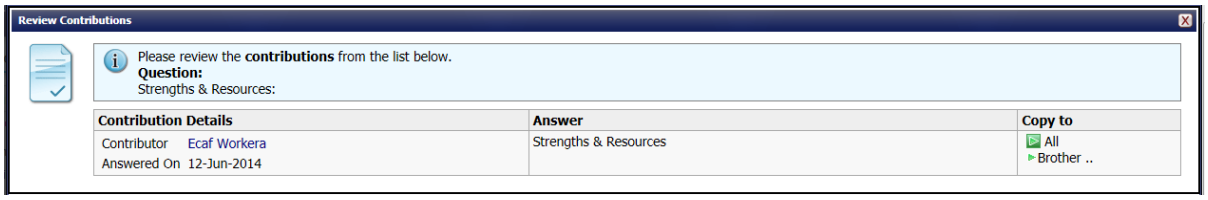
3. Click Copy to all to populate answers for all subjects or select person to copy to.

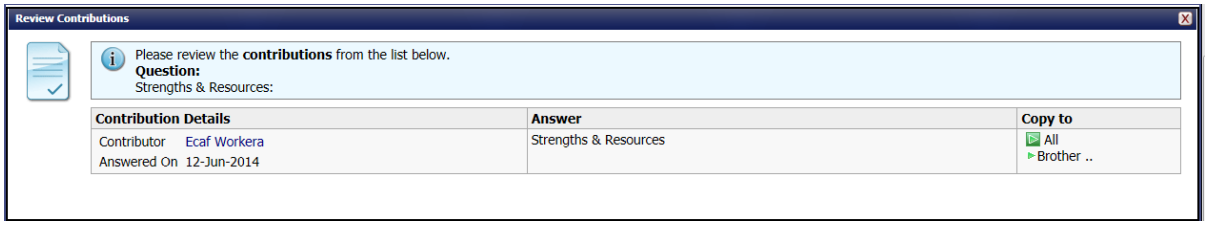



4. Click **OK** to continue
5. Finalise assessment.
6. Click **Populate Contribution Answers** to quickly merge information entered into the CAF assessment into the relevant fields


Brother Example, 11 years (Case No: 6)
CAF
CAF Assessment, 12-Jun-2014
Information
Assessment
Consolidation
Delegate
Revisions
Save
Populate Contribution Answers
Finalise Assessment
Close
Print
CAF Form
Identifying details
Information Sharing
Assessment Inform...
CAF Assessment S...
Conclusions, Soluti...
Comments and Co...
Signatures
Attachments (0)
Conclusions, Solutions and Actions
What are your aims?
View Contributions
What are the key aims the child, young person and/or family would like to address?
What are your conclusions?
(What are the child/young person's/families strengths and resources, what are their needs – e.g. no additional needs, additional needs, complex needs, risk of harm to self or others?)
Strengths & Resources:
View Contributions
Needs/ worries:
View Contributions
Suggested Outcomes
Progress to Meeting
Transfer to Children's Social Care
Continue with Existing Process
CAF Episode Completed
Reasons for these Suggested Outcomes
Reasons
What changes are wanted?
(Include the child/young person's, parent/carer's and practitioner's views)
How can change happen?
Agreed Actions (At least one action must be entered)
(in order of priority list the actions agreed for the people present at the assessment)
View Contributions
Desired Outcomes
(as agreed with child, young person and/or family)
Action
Who will do this?
By when?
Agreed review date
Goals
(e.g. How will you know that things have improved? What will things look like at review?)

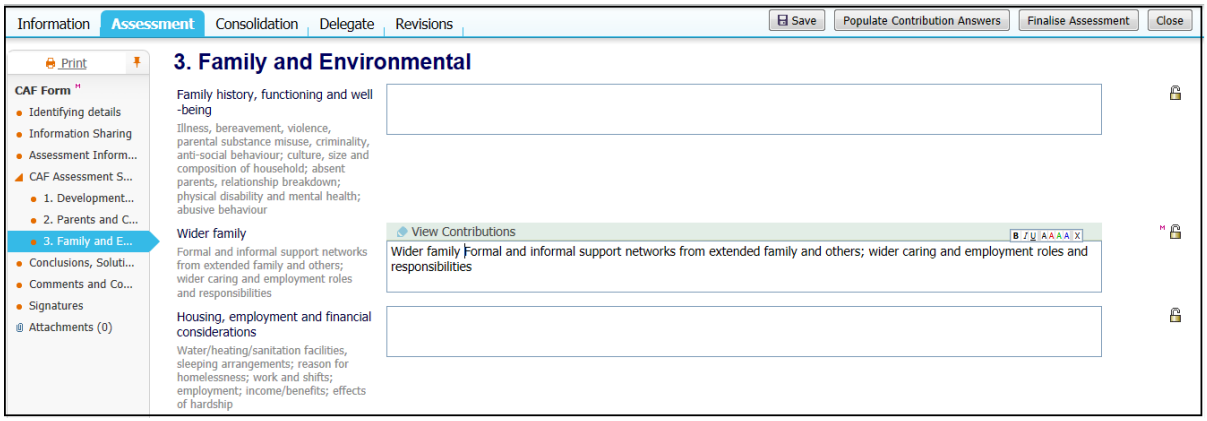
This will merge previously entered data into the corresponding fields, see example below:




**NOTE**: The answer from the assessment contribution will be included as an answer within the main CAF Assessment form; however the name of the contributor and date will be excluded. If required, the episode coordinator can edit these details to include such additional information. However the original answers can be viewed by clicking View Contributions.

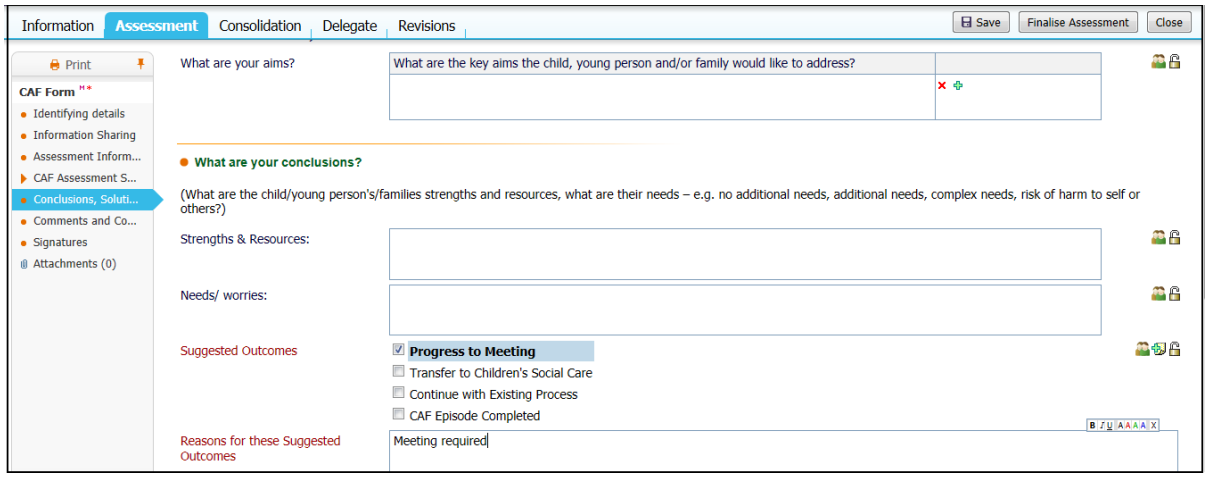
7. Navigate through the different sections of the CAF form (on the left-hand side) to update the necessary information as required and click **Save Changes**


Information
Assessment
Consolidation
Delegate
Revisions
Save
Populate Contribution Answers
Finalise Assessment
Close
Print
CAF Form
Identifying details
Information Sharing
Assessment Inform...
CAF Assessment S...
1. Development...
2. Parents and C...
3. Family and E...
Conclusions, Soluti...
Comments and Co...
Signatures
Attachments (0)
3. Family and Environmental
Family history, functioning and well-being
Illness, bereavement, violence, parental substance misuse, criminality, anti-social behaviour; culture, size and composition of household; absent parents, relationship breakdown; physical disability and mental health; abusive behaviour
Wider family
Formal and informal support networks from extended family and others; wider caring and employment roles and responsibilities
View Contributions
Wider family Formal and informal support networks from extended family and others; wider caring and employment roles and responsibilities
Housing, employment and financial considerations
Water/heating/sanitation facilities, sleeping arrangements; reason for homelessness; work and shifts; employment; income/benefits; effects of hardship

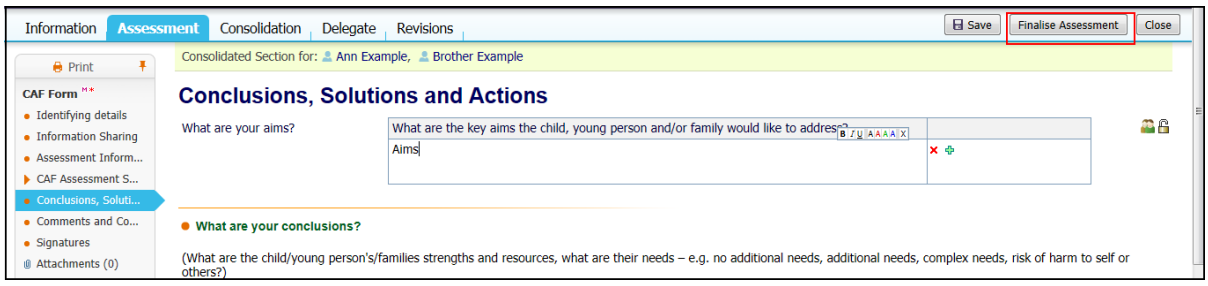
## *Recording Suggested Outcomes and completing the CAF*

1. Navigate to the **Suggested Outcomes** area within the CAF Assessment and select the **checkbox**(es) for the proposed action(s) and enter **reasons** for this

**NOTE**: This may differ depending on your customer configuration.

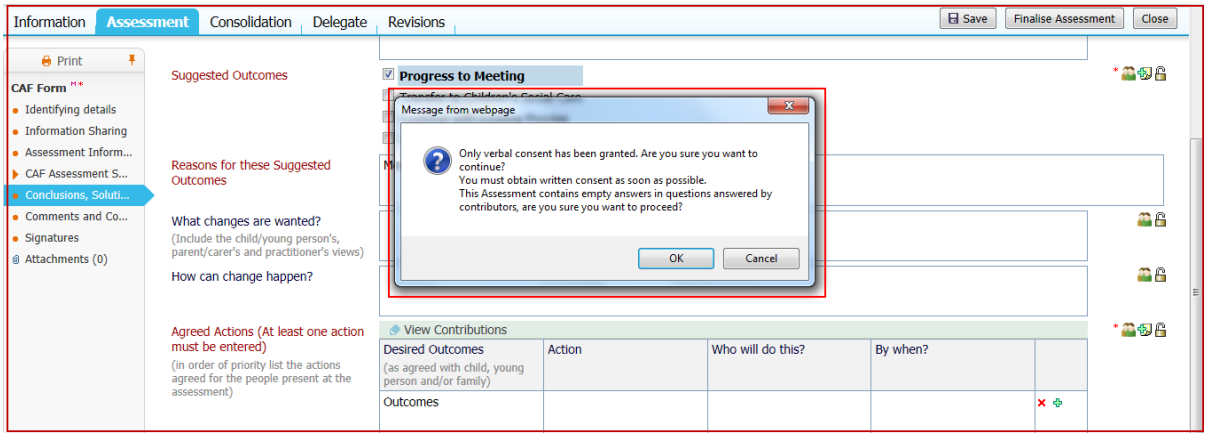



2. . Once complete click **Finalise Assessment**



3. Click **OK** to confirm your action when prompted (or **Cancel** if required)

Note: if only verbal consent has be given you will be prompted to obtain written consent



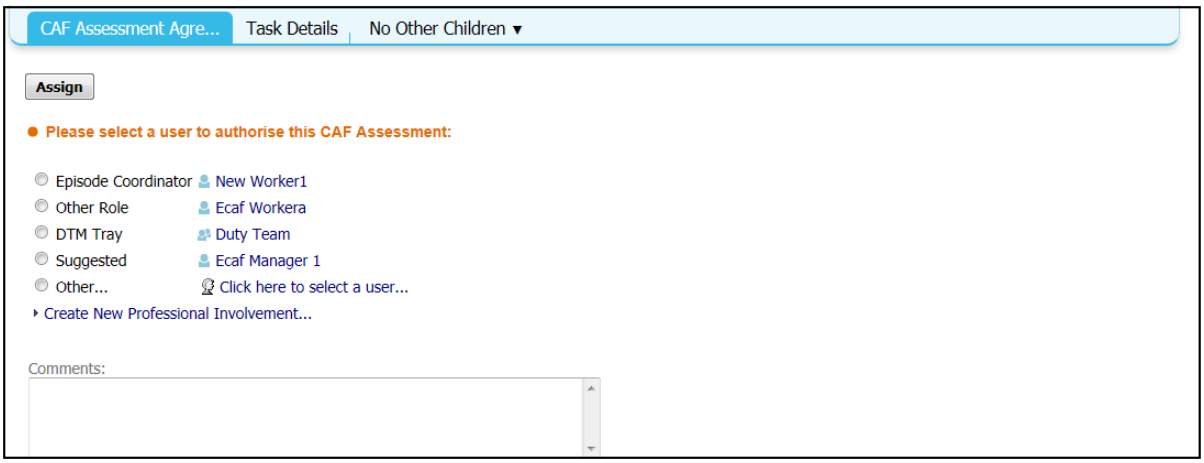

The Episode Coordinator will be prompted if the CAF assessment contains questions that have been answered by contributors but have been left blank within the CAF form as well as if written consent has still not been obtained, see example below:

4. Click **Continue** to disregard the prompt and continue to finalise the CAF assessment or alternatively click **Cancel** to return to the form to include further answers from assessment contributors

Once finalised the Episode Coordinator will be prompted to select who should authorise the CAF form. Please note this will be dependent on your configuration as to whether or not assessment needs to be authorised. A task will be generated to authoriser to check the assessment and authorised

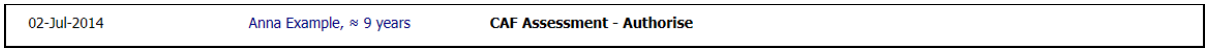
5. Select the radio button to specify where to send the authorisation of the CAF to and click **Assign**

**NOTE**: The options below may differ depending on your customer configuration.

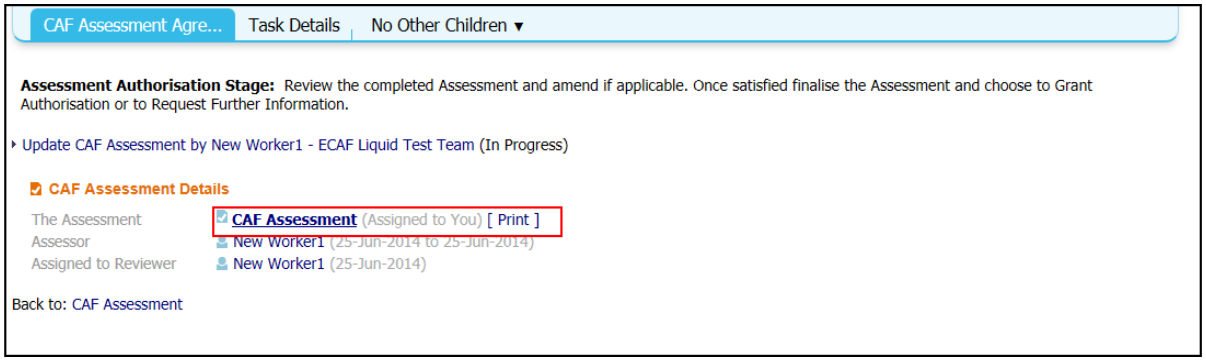



## *Authorising the CAF Assessment*

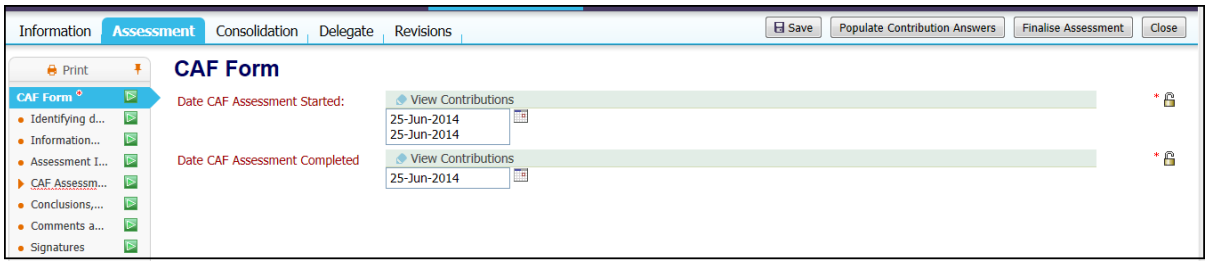
1. Select the CAF Assessment – Authorise task from the worktray:



2. Select the hyperlink to open the CAF form

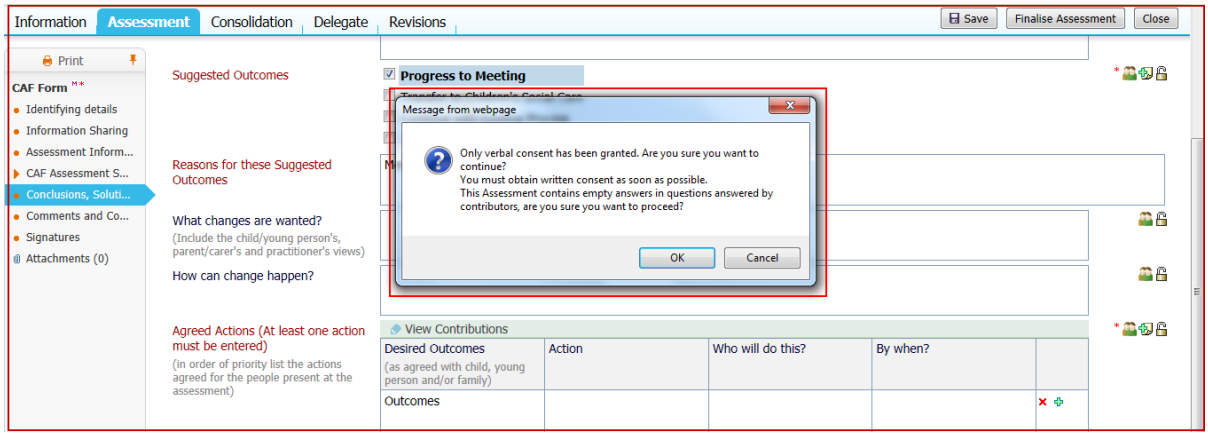

CAF Assessment Agre...
Task Details
No Other Children
Assessment Authorisation Stage: Review the completed Assessment and amend if applicable. Once satisfied finalise the Assessment and choose to Grant Authorisation or to Request Further Information.
Update CAF Assessment by New Worker1 - ECAF Liquid Test Team (In Progress)
CAF Assessment Details
The Assessment
CAF Assessment (Assigned to You) [ Print ]
Assessor
New Worker1 (25-Jun-2014 to 25-Jun-2014)
Assigned to Reviewer
New Worker1 (25-Jun-2014)
Back to: CAF Assessment

3. Read the CAF form and edit if required. Once reviewed click **Finalise Assessment** and then **OK** to confirm




**NOTE**: The authoriser of the CAF form will also be alerted if written consent has still not been obtained. This prompt is client configurable. Please consult your Liquidlogic project Manager for details.

4. Click **OK** if prompted



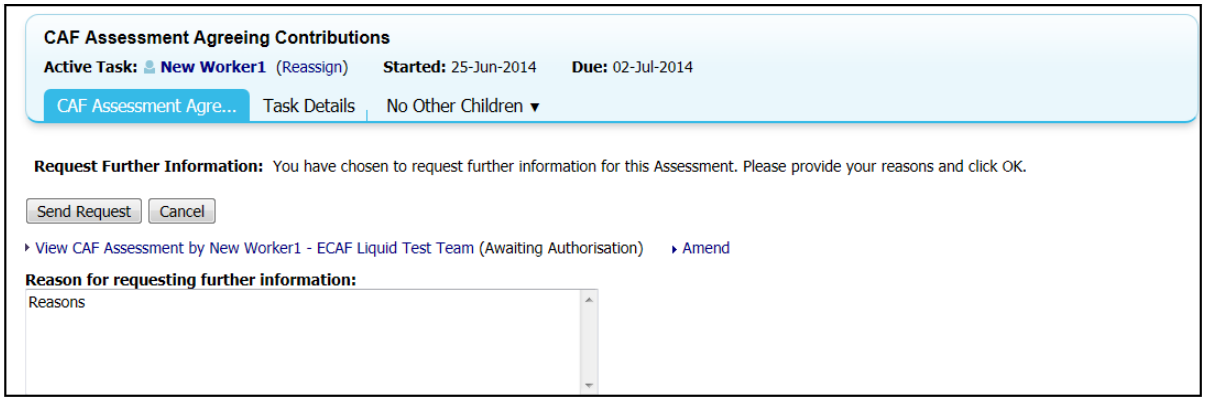

5. Click **Authorise** or **Request Further Information**, as required

CAF Assessment Agre...
Task Details
No Other Children
Assessment Authorisation Stage: Review the completed Assessment and amend if applicable. Once satisfied finalise the Assessment and choose to Grant Authorisation or to Request Further Information.
Authorise
Request Further Information
View CAF Assessment by New Worker1 - ECAF Liquid Test Team (Awaiting Authorisation)
Amend
CAF Assessment Details
The Assessment
CAF Assessment (Session Finalised) [ Print ]
Assessor
New Worker1 (25-Jun-2014 to 25-Jun-2014)
Reviewer
New Worker1 (25-Jun-2014 to 25-Jun-2014)
Back to: CAF Assessment

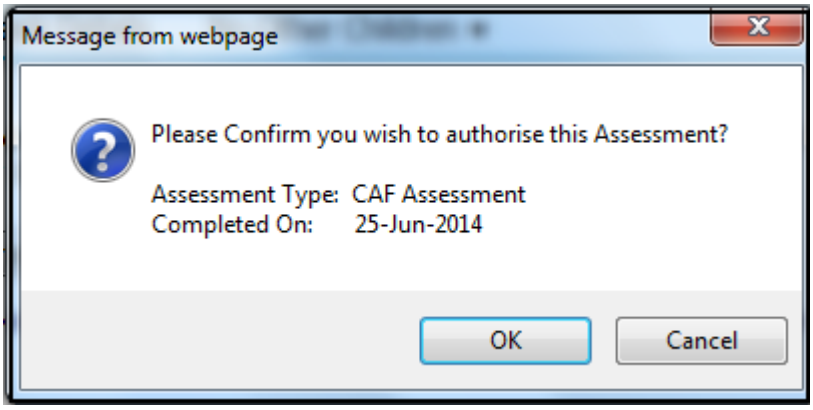
**NOTE**: Clicking on **Request Further Information** will prompt the authoriser to enter comments why they are sending the CAF back to the Episode Coordinator

6. Enter comments as required and then click **Send Request**

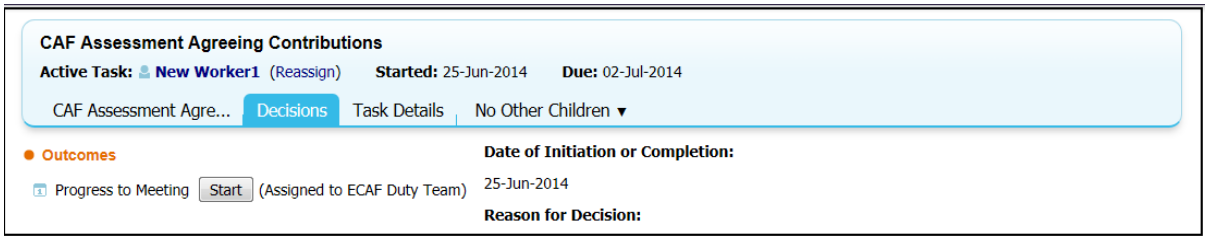
**TIP**: the CAF form will be re-assigned back to the Episode Coordinator who will then have a task for this including the authoriser's comments in their worktray.


CAF Assessment Agreeing Contributions
Active Task: New Worker1 (Reassign) Started: 25-Jun-2014 Due: 02-Jul-2014
CAF Assessment Agre... Task Details No Other Children
Request Further Information: You have chosen to request further information for this Assessment. Please provide your reasons and click OK.
Send Request Cancel
View CAF Assessment by New Worker1 - ECAF Liquid Test Team (Awaiting Authorisation) Amend
Reason for requesting further information:
Reasons

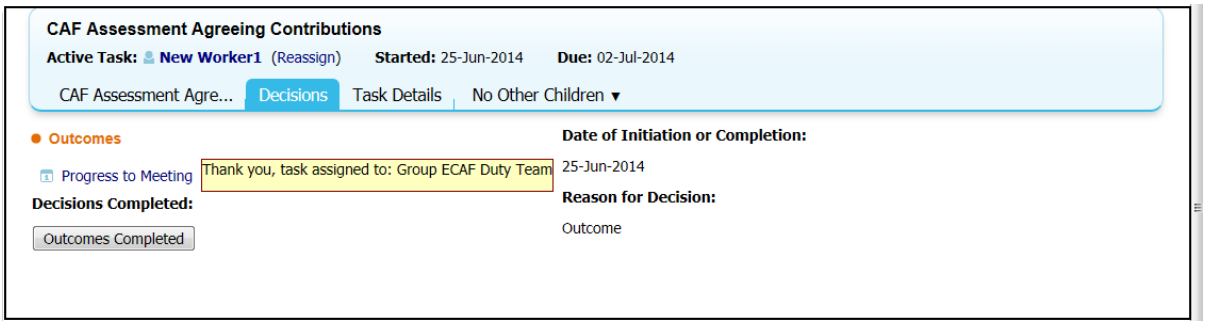
7. Alternatively click **Authorise** and then **OK** to confirm




8. Click **Start** next to the authorised Outcome(s) and then **OK** to confirm


CAF Assessment Agreeing Contributions
Active Task: New Worker1 (Reassign) Started: 25-Jun-2014 Due: 02-Jul-2014
CAF Assessment Agre... Decisions Task Details No Other Children
Outcomes
Progress to Meeting Start (Assigned to ECAF Duty Team)
Date of Initiation or Completion:
25-Jun-2014
Reason for Decision:

9. Click **Outcomes Completed** and then **OK** to end the CAF assessment Agreeing Contributions stage on the Case pathway and continue with the new outcome


CAF Assessment Agreeing Contributions
Active Task: New Worker1 (Reassign) Started: 25-Jun-2014 Due: 02-Jul-2014
CAF Assessment Agre... Decisions Task Details No Other Children
Outcomes
Progress to Meeting
Thank you, task assigned to: Group ECAF Duty Team
Decisions Completed:
Outcomes Completed
Date of Initiation or Completion:
25-Jun-2014
Reason for Decision:
Outcome

**TIP**: The Completed CAF Assessment can be viewed but not edited unless the decision to restart a new version of the CAF is selected. Please refer to the CAF Assessment or CAF Assessment Agreeing Contributions stage in the Case Pathway or the Activities tab to access the completed CAF.

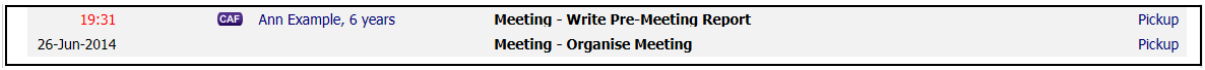
Following the completion of the CAF Assessment Agreeing Contributions stage, one or more of these outcomes may be started:

| | |
|---|---|
| Progress to Meeting | Episode Coordinator can start a further CAF Assessment |
| Transfer to ics | Episode Coordinator can transfer the episode to ics. Details including the CAF form can only be transferred if connected to a ics system |
| Episode Completed | Episode Coordinator can close the episode if no other outcome is to be pursued and no further action is required |

**NOTE**: The list of outcomes may differ on your customer configuration. Please refer to your EHM project Manager for further guidance.

## *CAF Outcome - Recording a Meeting*

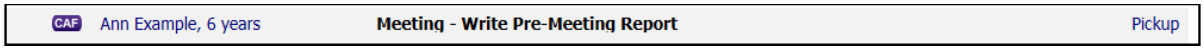
A task will be generated to organise the meeting. This may be sent to a group worktray rather than a person's individual worktray depending on your customer configuration. An additional task to write a pre-meeting report may also be generated depending on your customer configuration. Please refer to your Liquidlogic Project Manager for details.



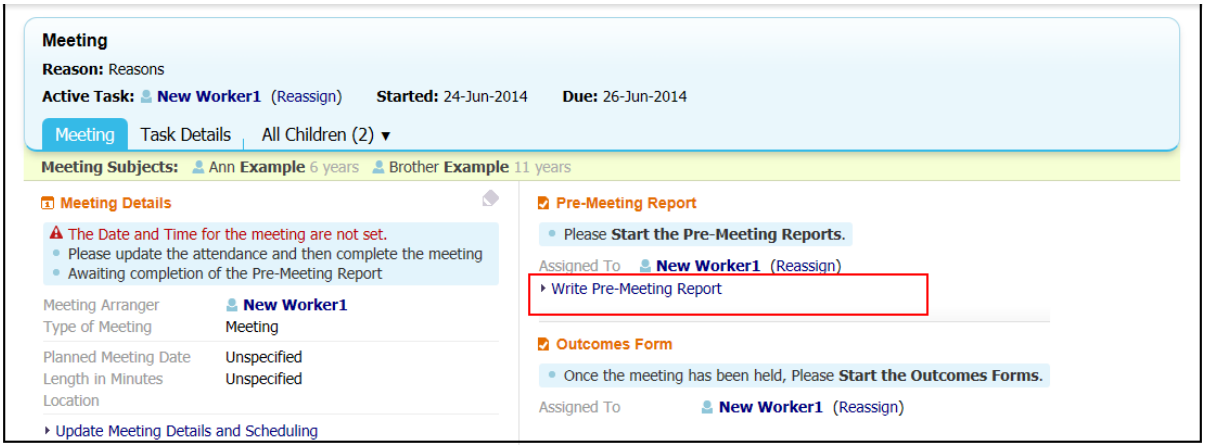

## *Writing the Pre Meeting Report*

**NOTE**: This is only applicable to customers who have enabled this functionality in their EHM system.

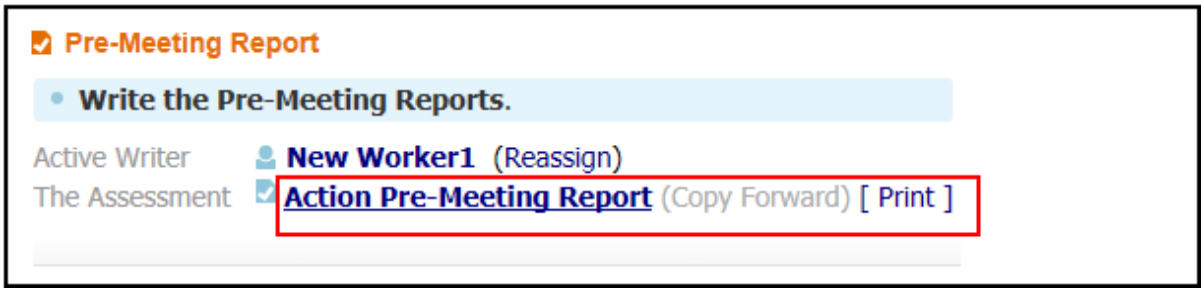
1. Click **Pickup** next to the **Meeting – Write Pre Meeting Report** task from the group worktray or select the task description if the task is assigned to you in your worktray



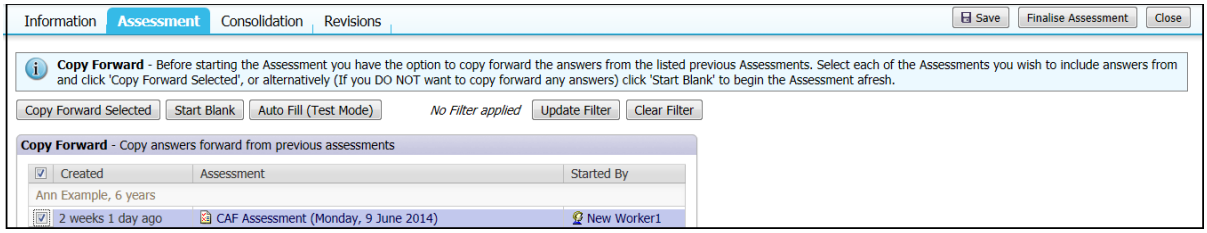

2. Click **Write Pre Meeting Report**



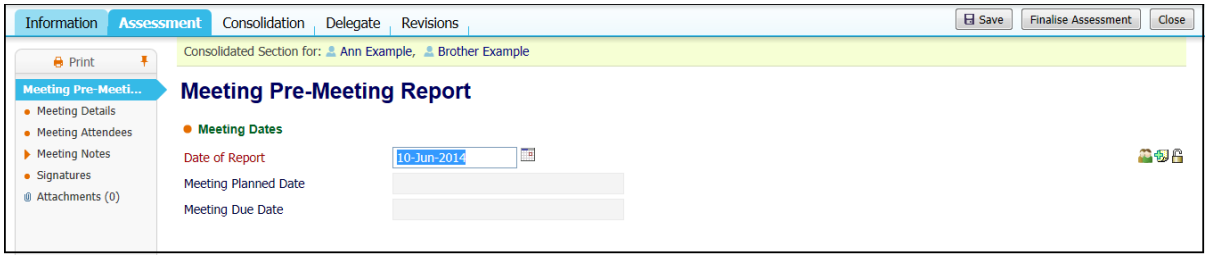

3. Select the **hyperlink** to open the pre-meeting report




4. Select the option to either start a **blank form** or to **copy forward** answers from previous selected assessments (use the checkboxes to specify which previous assessments)

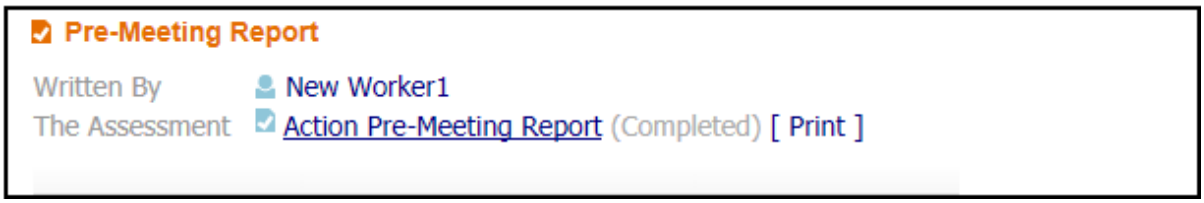

Information
Assessment
Consolidation
Revisions
Save
Finalise Assessment
Close
Copy Forward - Before starting the Assessment you have the option to copy forward the answers from the listed previous Assessments. Select each of the Assessments you wish to include answers from and click 'Copy Forward Selected', or alternatively (If you DO NOT want to copy forward any answers) click 'Start Blank' to begin the Assessment afresh.
Copy Forward Selected
Start Blank
Auto Fill (Test Mode)
No Filter applied
Update Filter
Clear Filter
Copy Forward - Copy answers forward from previous assessments
Created
Assessment
Started By
Ann Example, 6 years
2 weeks 1 day ago
CAF Assessment (Monday, 9 June 2014)
New Worker1

5. Enter the **date** the report was completed



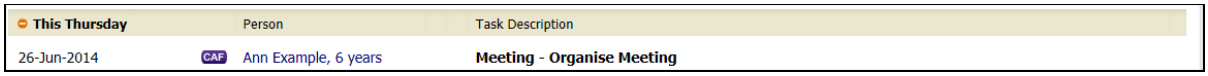

6. Complete the sections, entering details as required and then click **Finalise Assessment** and then **OK**

The finalised Pre-Meeting report will have a status of completed within the meeting organiser. Select the hyperlink to view or print this as required:




## *Organising the Meeting*

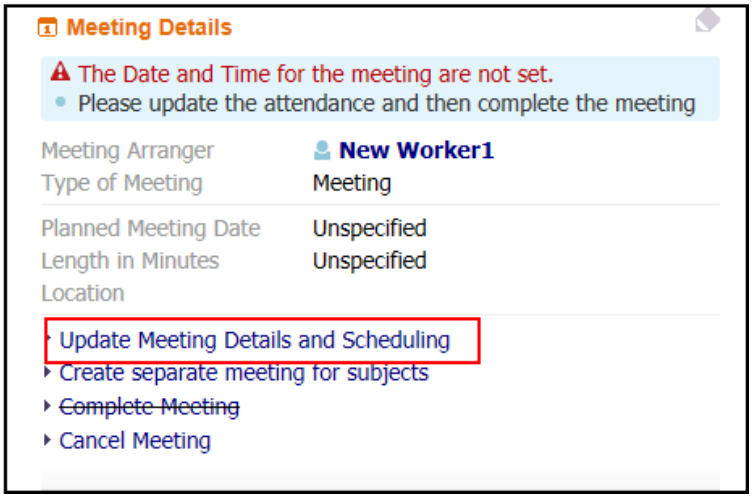
1. Select the **Meeting – Organise Meeting** task from the worktray




Please refer to the sections below for details on scheduling the meeting and inviting attendees.

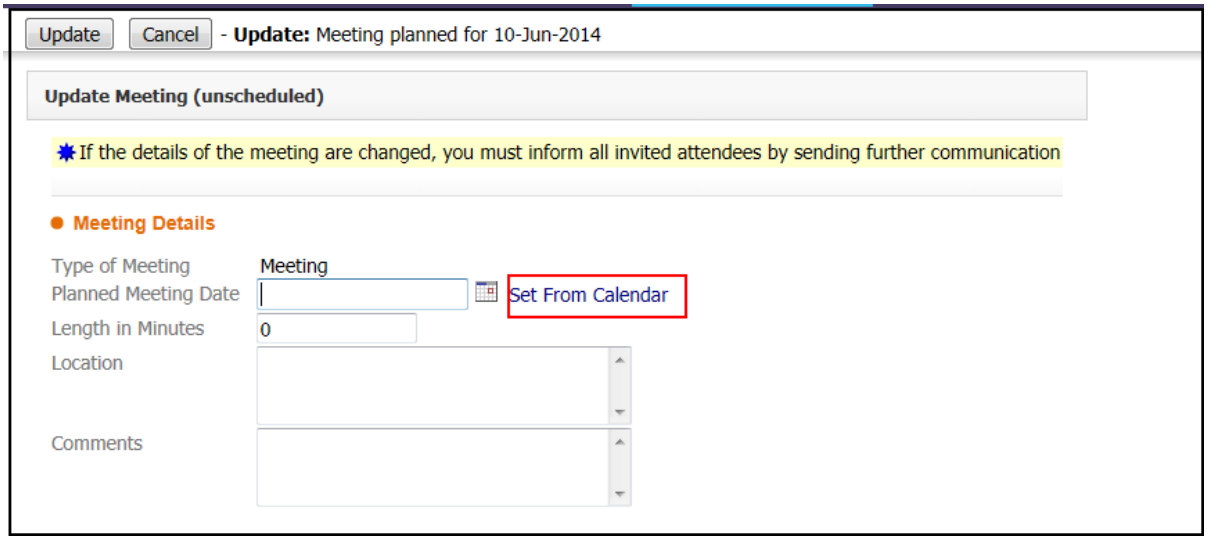
### Setting the Date and Time

1. To set a date/time for the Meeting click on **Update Meeting Details and Scheduling** from the Meeting Details section of the meeting organiser

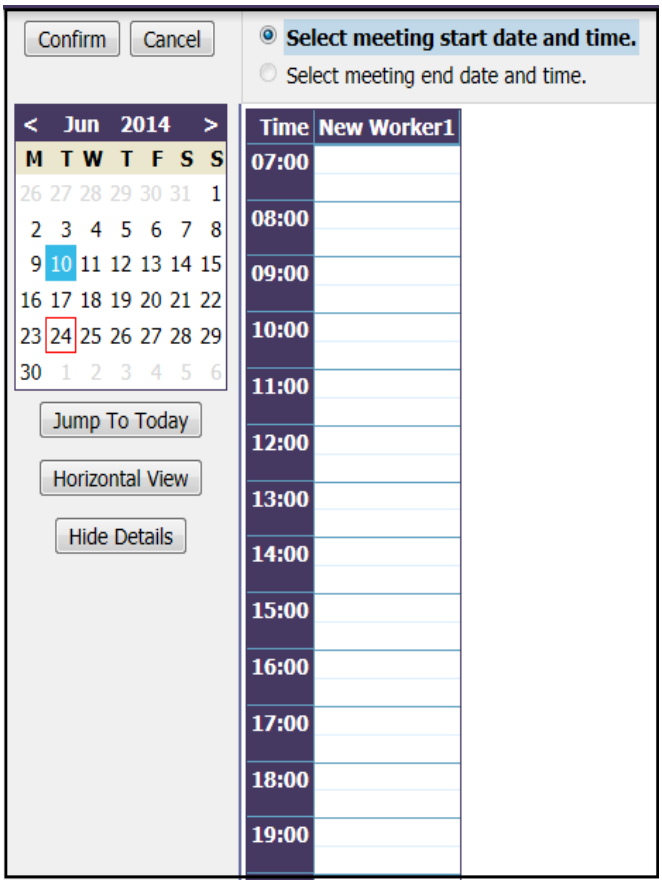



The following screen allows you to enter details for the date, time and location of the meeting.

2. Enter the meeting date or click **Set from Calendar** to use the calendar to set the meeting date

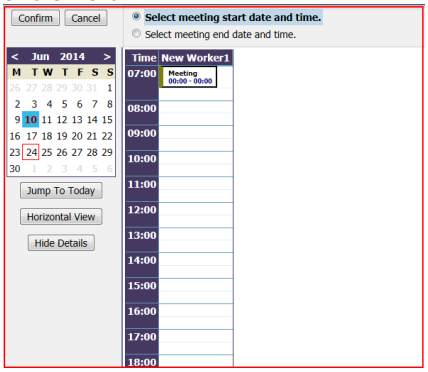



3. Click on the **date** the meeting will be held.
4. Click next to a timeslot on the calendar for the **start time**
5. Click next to a timeslot again on the calendar for the **end time**
6. Click **Confirm** to set the date and time of the meeting




**Selecting a different month/year**

To change the month in the calendar click on the month



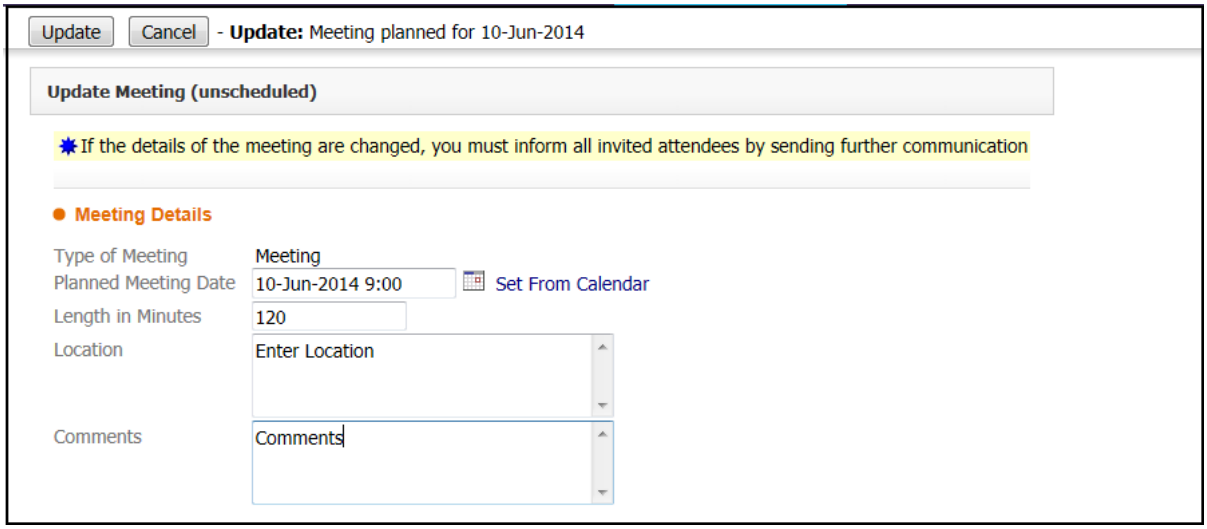
in this example Jun:

Click on the month required.

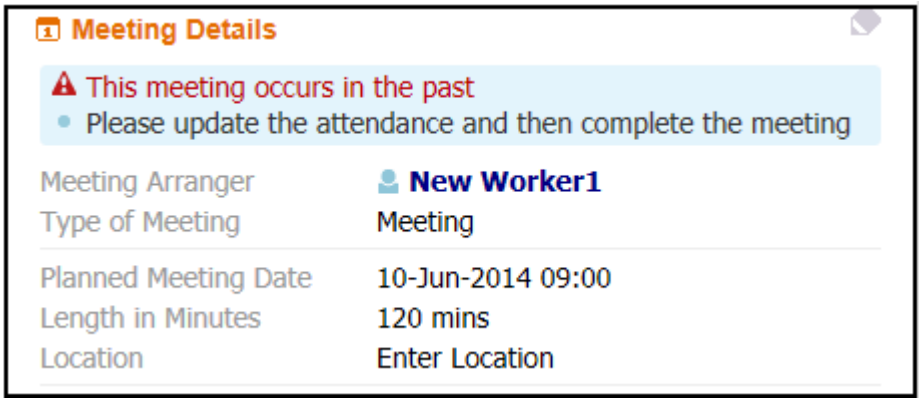
This method can also be used when selecting the year.

You can also navigate through the months using the **>** or **<** symbols. Use **>** to move forward through the calendar and **<** to move backwards.

7. Enter the **location** of the meeting into the Location box
8. Click **Update**

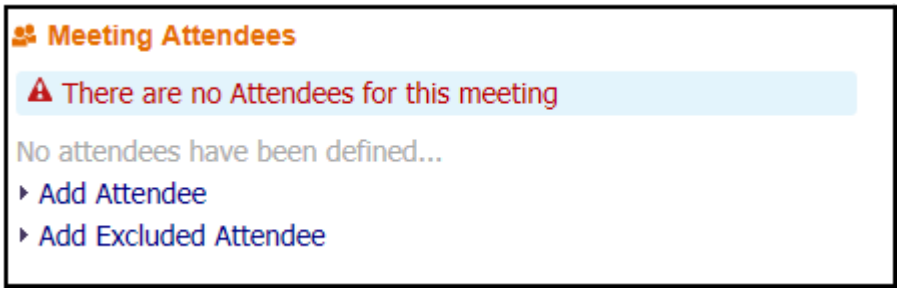



This will save the information under the Meeting Details area of the Meeting Organiser:




## Adding Attendees

1. Click **Add Attendee**



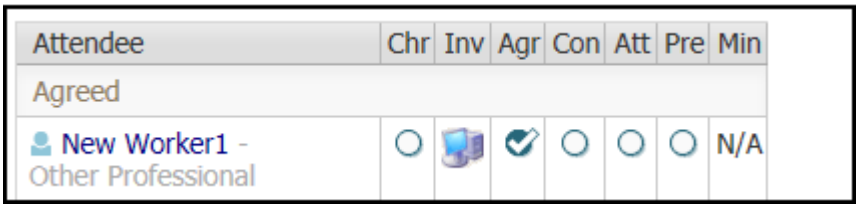

2. Select the Check **boxes** to the left of the required attendee or use the relevant hyperlink to search for another professional, person record, key agency or relation

Create
Cancel
- Meeting - Add New Attendee
New Meeting Attendee
Involved Professionals
Attention: Only Episode Coordinator and Assistants are listed
Episode Coordinator
New Worker1
Episode Coordinator (Assistant)
Ecaf Workera
Click to Create Professional Involvement for Ann Example...
Click to Create Professional Involvement for Brother Example...
Key Agencies
There are no Key Agencies defined
Click to Add a Key Agency for Ann Example...
Click to Add a Key Agency for Brother Example...
Family Members
Mother
Mother Example, ≈ 37 years
The Child
Ann Example, 6 years
The Child
Brother Example, 11 years
Click to edit Family Members for Ann Example...
Click to edit Family Members for Brother Example...

3. Once selected, click **Create** to add the attendee to the list of attendees in the meeting organiser screen

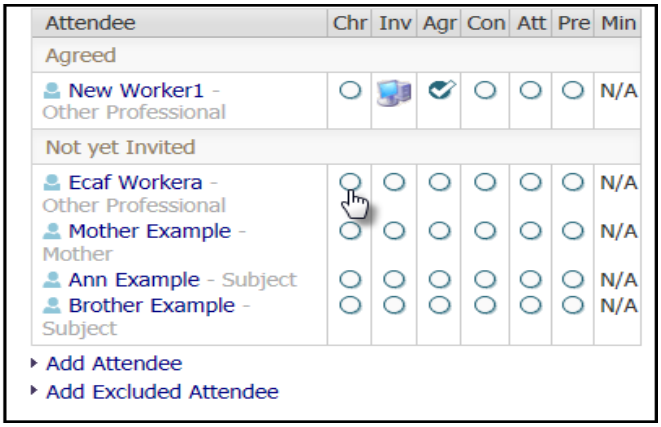
The Attendee will be added to the Meeting Organiser. Click **Add Attendee** again to repeat this process.

**TIP**: When adding yourself as an attendee you will automatically be identified as both invited and agreed to attend

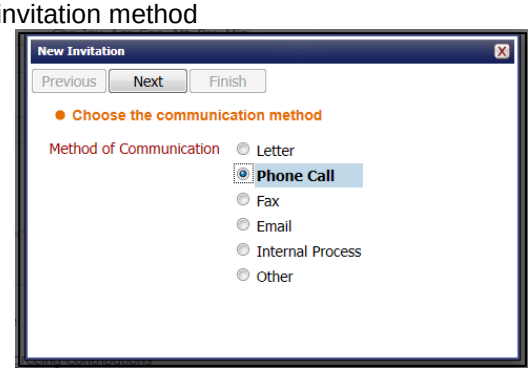



### *Meeting Attendee Options*

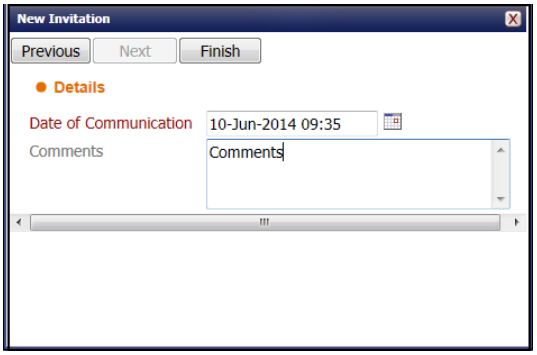
1. Select the radio button of an attendee from the Meeting Organiser to send invitations.



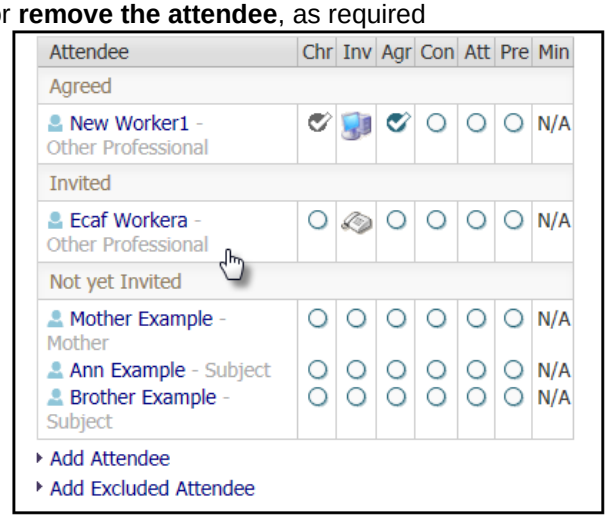
2. Select the relevant invitation method

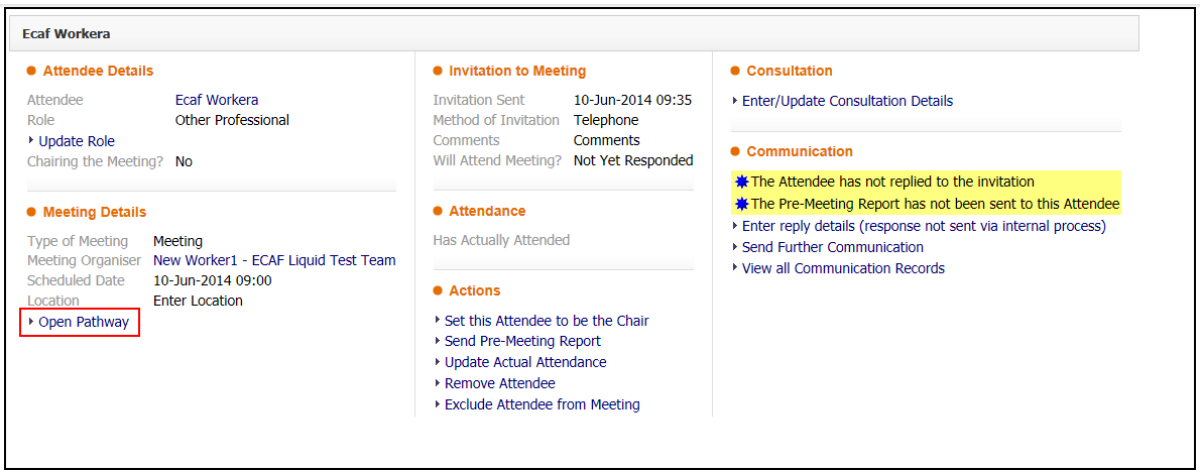



3. Click on Next
4. Record the date and comments and click finish




5. Click on the various hyperlinks on the attendee details screen to **send invitations**, record **replies** to invitations, **update attendance**, record that a **pre meeting report has been s**ent to the attendee (if applicable) or **remove the attendee**, as required



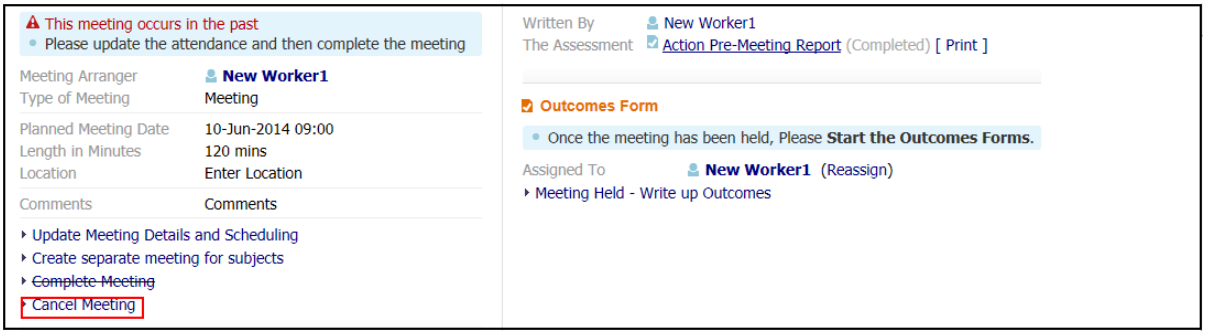
**TIP**: Click **Open Pathway** or the **Pathway** icon to return to the Meeting Organiser

**NOTE**: Please refer to the **EHM Meetings** document for further details.

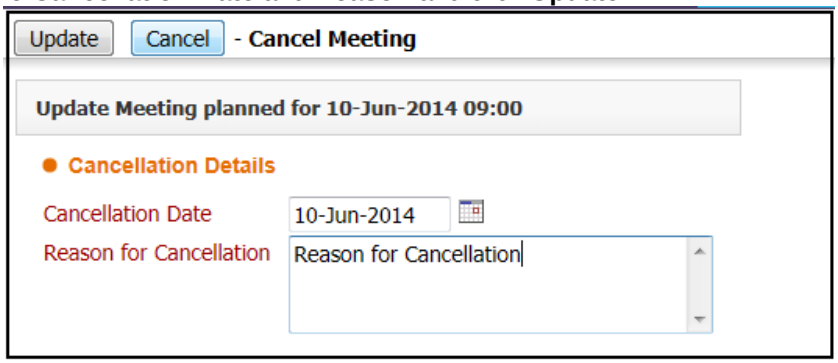
## Cancelling the Meeting

If a meeting has been cancelled and rescheduled it is easier to simply change the date and time of the meeting rather than cancelling it.

1. From the Meeting organiser, click **Cancel Meeting** and then click **OK** to confirm

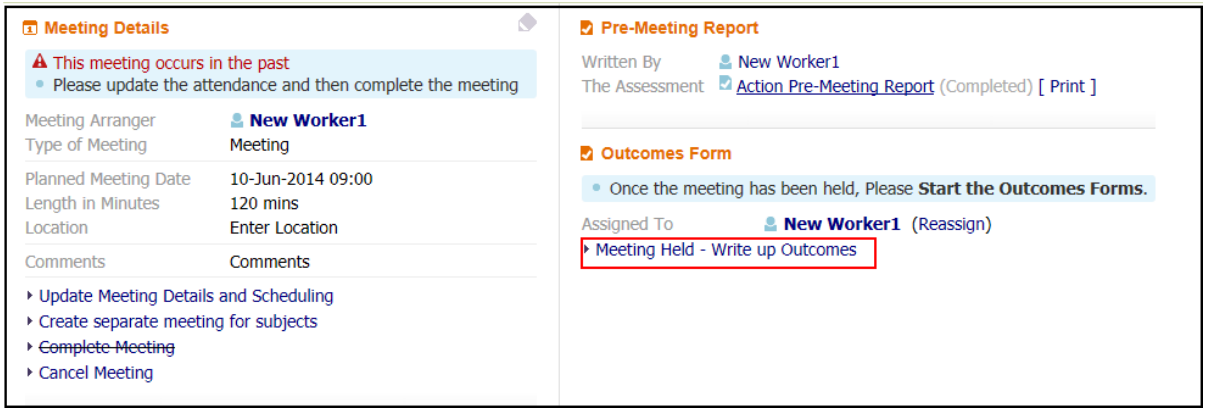



2. Enter the **Cancellation Date** and **Reason** and click **Update**

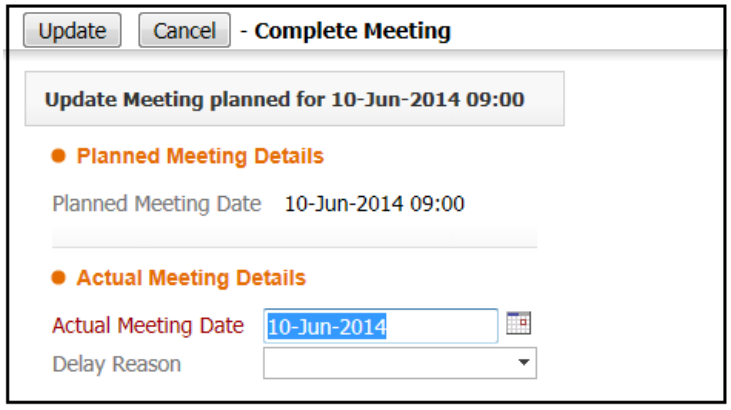


## *Recording Meeting Outcomes*

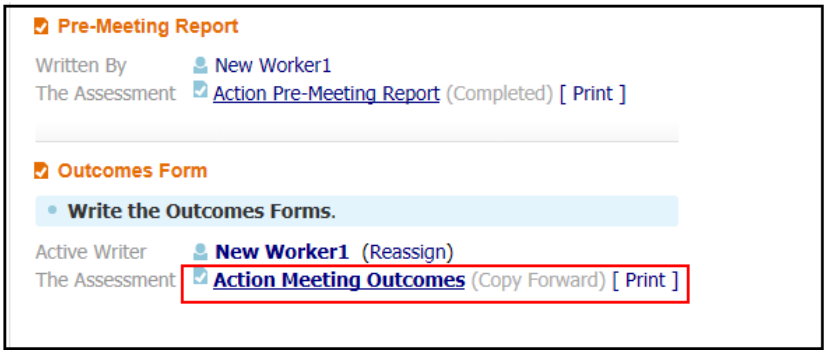
1. From the Meeting Organiser click **Complete Meeting Outcomes** and click **OK**



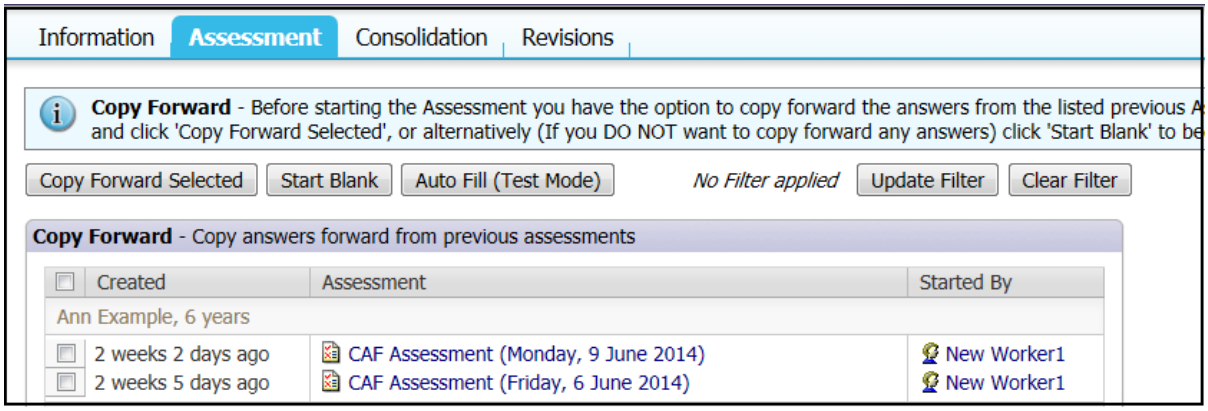

2. Enter the **Actual Meeting Date**
3. Select the **Delay** Reason, if applicable from the drop-down list
4. Click **Update**



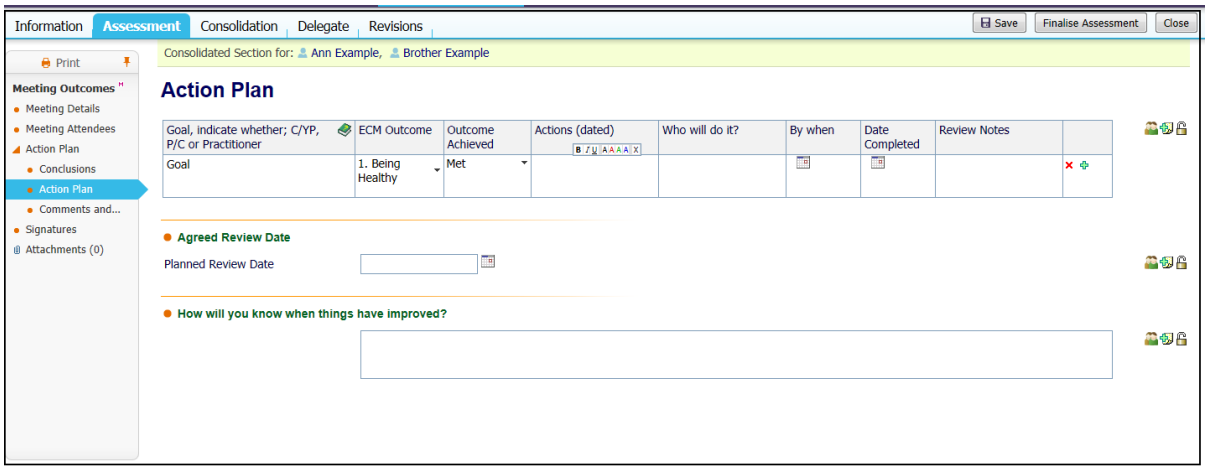

5. Click the Meeting Outcomes **hyperlink**



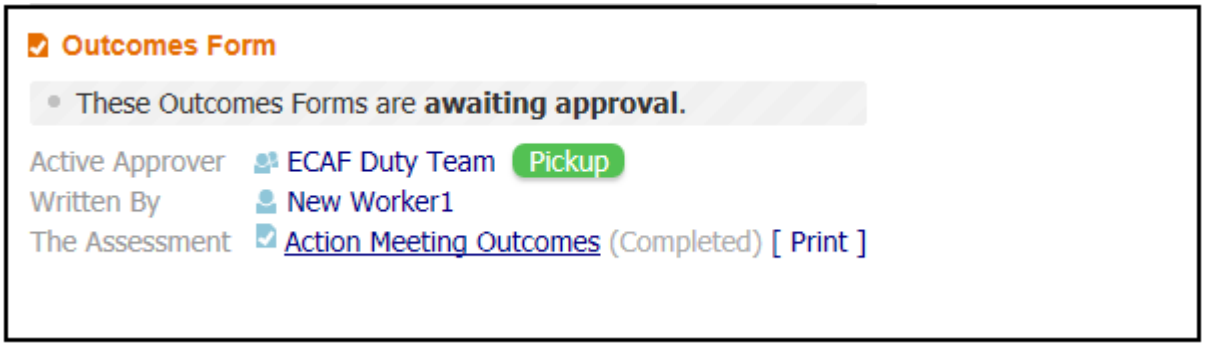
6. Select the option to either start a **blank form** or to **copy forward** answers from previous selected assessments (use the checkboxes to specify which previous assessments)


Information
Assessment
Consolidation
Revisions
Copy Forward - Before starting the Assessment you have the option to copy forward the answers from the listed previous A
and click 'Copy Forward Selected', or alternatively (If you DO NOT want to copy forward any answers) click 'Start Blank' to be
Copy Forward Selected
Start Blank
Auto Fill (Test Mode)
No Filter applied
Update Filter
Clear Filter
Copy Forward - Copy answers forward from previous assessments
Created
Assessment
Started By
Ann Example, 6 years
2 weeks 2 days ago
CAF Assessment (Monday, 9 June 2014)
New Worker1
2 weeks 5 days ago
CAF Assessment (Friday, 6 June 2014)
New Worker1

7. Complete the Meeting Outcomes/Action plan form as required. Click **Save Changes** and once completed click **Finalise Assessment** and **OK**



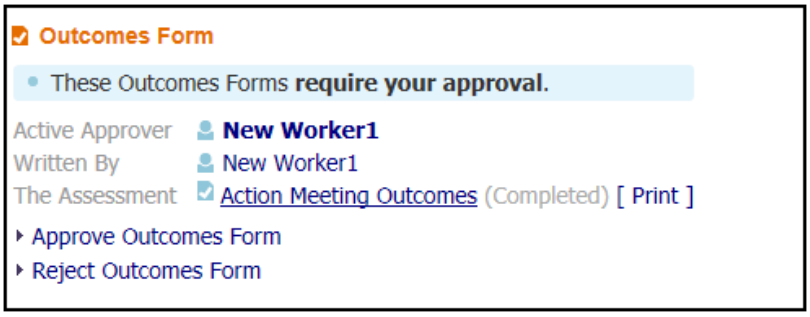

**NOTE**: Depending on your EHM customer configuration your Meeting Outcomes form may be sent for authorisation, see example below:



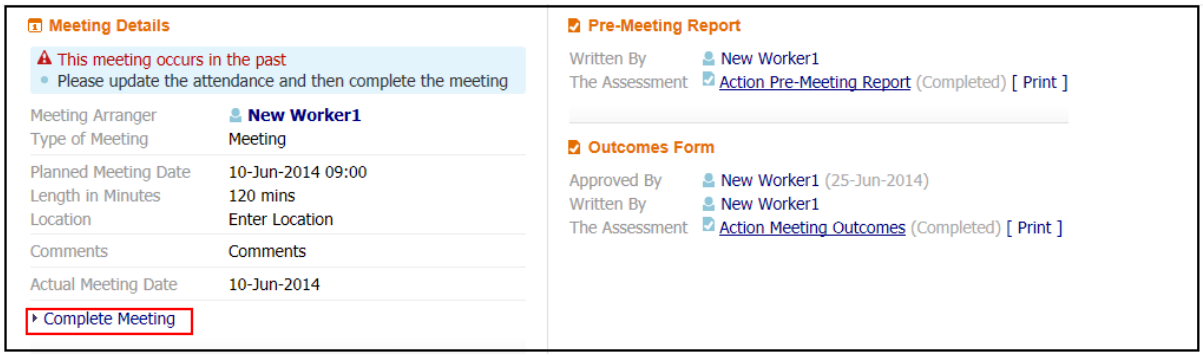
8. Select the authorisation task from the worktray (or click **Pickup** if this is assigned to a group tray

10-Jun-2014
CAF
Ann Example, 6 years
Meeting - Complete Meeting Outcomes - Please check the Report and Approve or Reject it
Pickup

9. Click **Approve Outcomes Report** or **Reject Outcomes Report** as required


Outcomes Form
These Outcomes Forms require your approval.
Active Approver New Worker1
Written By New Worker1
The Assessment Action Meeting Outcomes (Completed) [ Print ]
Approve Outcomes Form
Reject Outcomes Form

10. Click **Complete Meeting** once the Meeting Outcomes are completed (and authorised, if required) and then **OK** to confirm

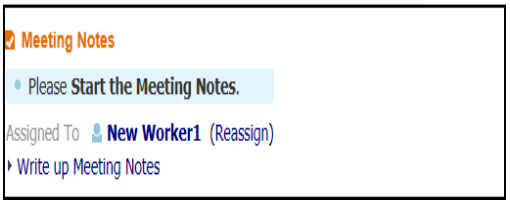

Meeting Details
This meeting occurs in the past
Please update the attendance and then complete the meeting
Meeting Arranger New Worker1
Type of Meeting Meeting
Planned Meeting Date 10-Jun-2014 09:00
Length in Minutes 120 mins
Location Enter Location
Comments Comments
Actual Meeting Date 10-Jun-2014
Complete Meeting
Pre-Meeting Report
Written By New Worker1
The Assessment Action Pre-Meeting Report (Completed) [ Print ]
Outcomes Form
Approved By New Worker1 (25-Jun-2014)
Written By New Worker1
The Assessment Action Meeting Outcomes (Completed) [ Print ]

## *Writing the Minutes*

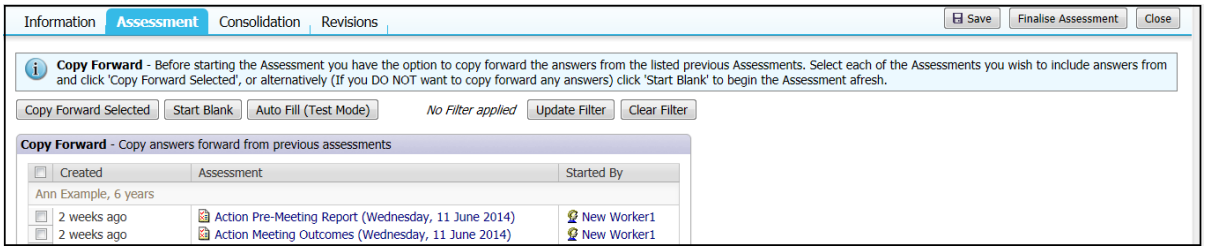
**NOTE**: This is only applicable to customers who have enabled this functionality in their EHM system.

1. Click **Pickup** next to the **Meeting – Write and Distribute Meeting Notes** task from the group worktray or select the task description if the task is assigned to you in your worktray

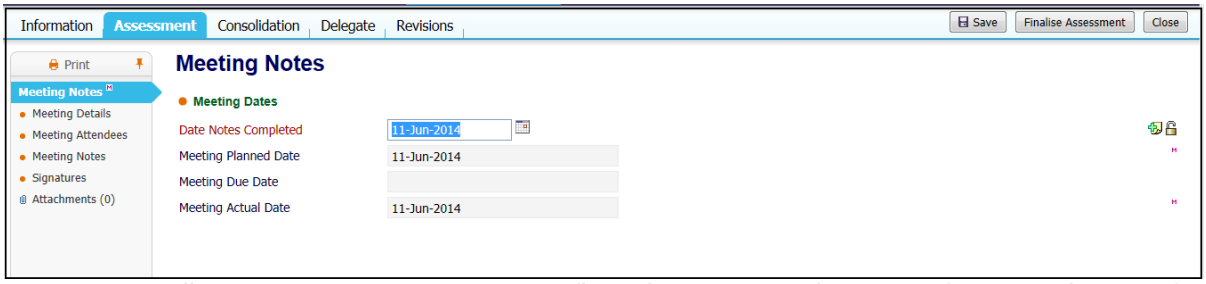
2. Click the **Write up Meeting Notes** link from the bottom of the Meeting Organiser



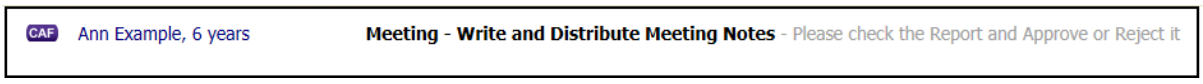

3. Select the option to either start a **blank form** or to **copy forward** answers from previous selected assessments (use the checkboxes to specify which previous assessments)


Information
Assessment
Consolidation
Revisions
Save
Finalise Assessment
Close
Copy Forward - Before starting the Assessment you have the option to copy forward the answers from the listed previous Assessments. Select each of the Assessments you wish to include answers from and click 'Copy Forward Selected', or alternatively (If you DO NOT want to copy forward any answers) click 'Start Blank' to begin the Assessment afresh.
Copy Forward Selected
Start Blank
Auto Fill (Test Mode)
No Filter applied
Update Filter
Clear Filter
Copy Forward - Copy answers forward from previous assessments
Created
Assessment
Started By
Ann Example, 6 years
2 weeks ago
Action Pre-Meeting Report (Wednesday, 11 June 2014)
New Worker1
2 weeks ago
Action Meeting Outcomes (Wednesday, 11 June 2014)
New Worker1

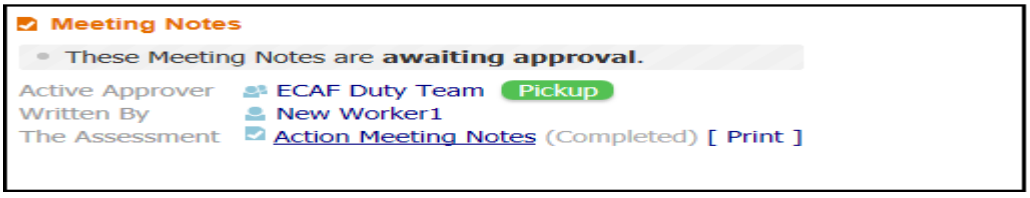
4. Enter the **date** the Minutes were completed and the details within the Meeting Notes section. Click **Save Changes** and once completed select the **Finalise Assessment** button



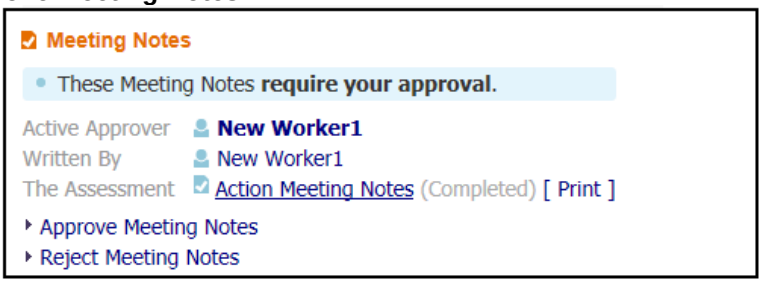

**NOTE**: Depending on your EHM customer configuration your Meeting Notes form may be sent for authorisation, see example below:



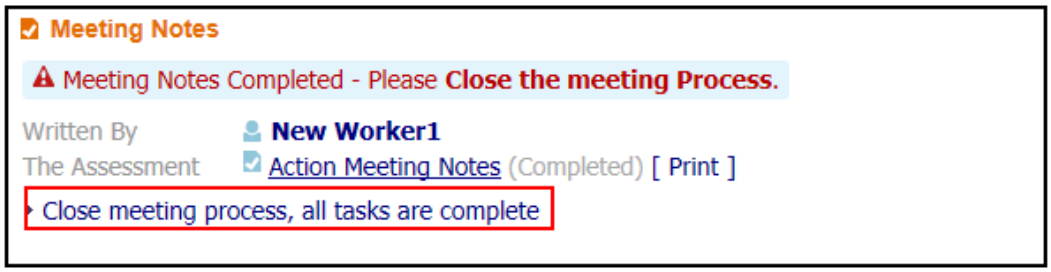

5. Select the authorisation task from the worktray (or click **Pickup** if this is assigned to a group tray




6. Click **Approve Meeting Notes**



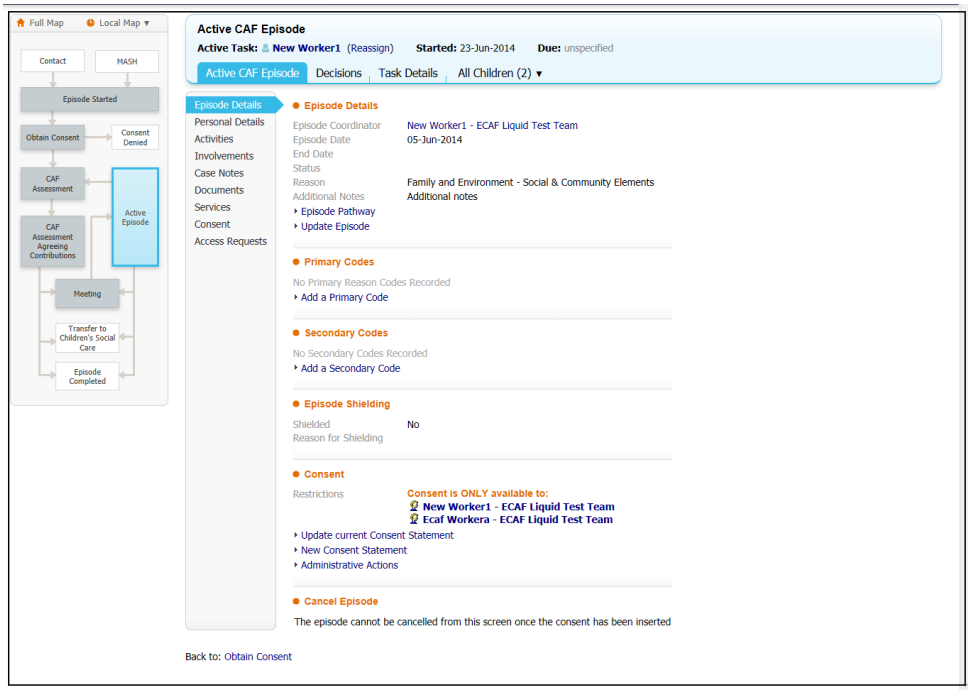

7. Click **Close Meeting process, all tasks are complete** to end the Meeting


Meeting Notes
Meeting Notes Completed - Please Close the meeting Process.
Written By
New Worker1
The Assessment
Action Meeting Notes (Completed) [ Print ]
Close meeting process, all tasks are complete

## *Meeting Outcome – Continue Existing Process*

The Continue Existing Process outcome within the Meeting Outcomes form will display an active episode. The Episode Coordinator can use the Episode Details tabs and Demographics to record and update information as required.

**NOTE**: Please refer to the **EHM Episode Details** document or **EHM Demographics** document for further details.

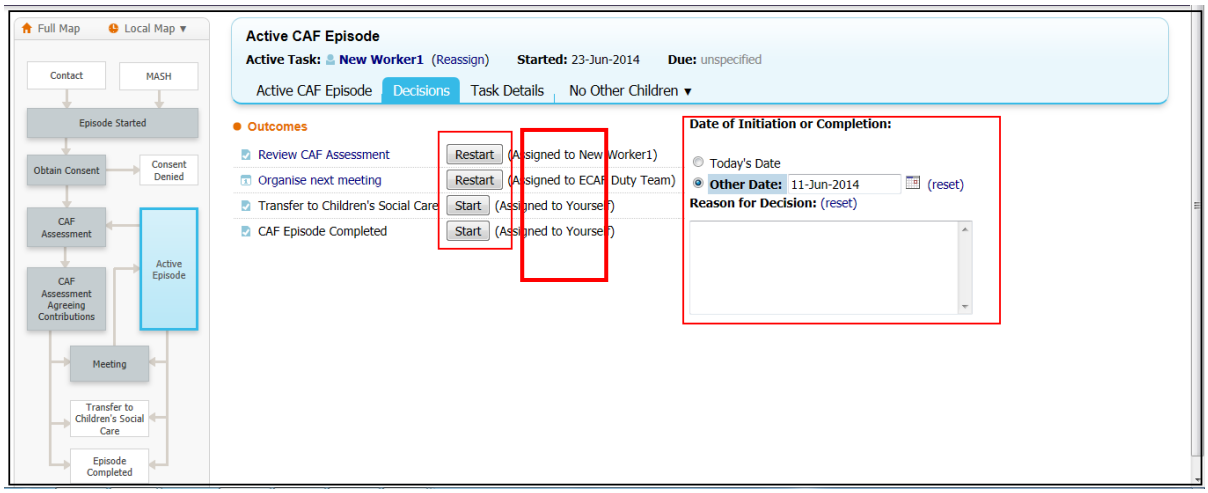


# Active Episode Decisions

1. Select the **Active Episode** task from the worktray to display the **Active Episode** Decisions tab

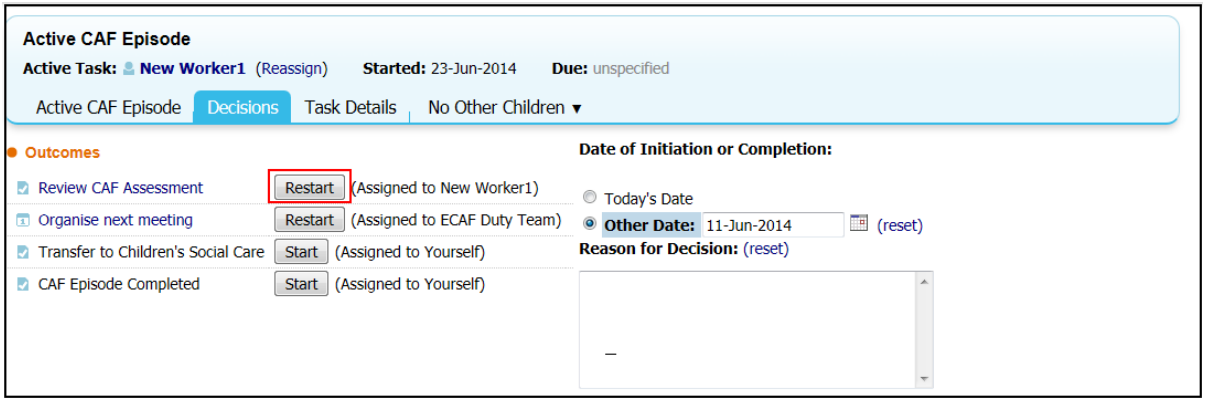
Outcomes can be started manually from the decisions tab as required by using the Start or Restart buttons.

**TIP**: Ensure that the **date of initiating** the required outcome is correct before clicking 'Start/Restart'




## *Review CAF Assessment decision*

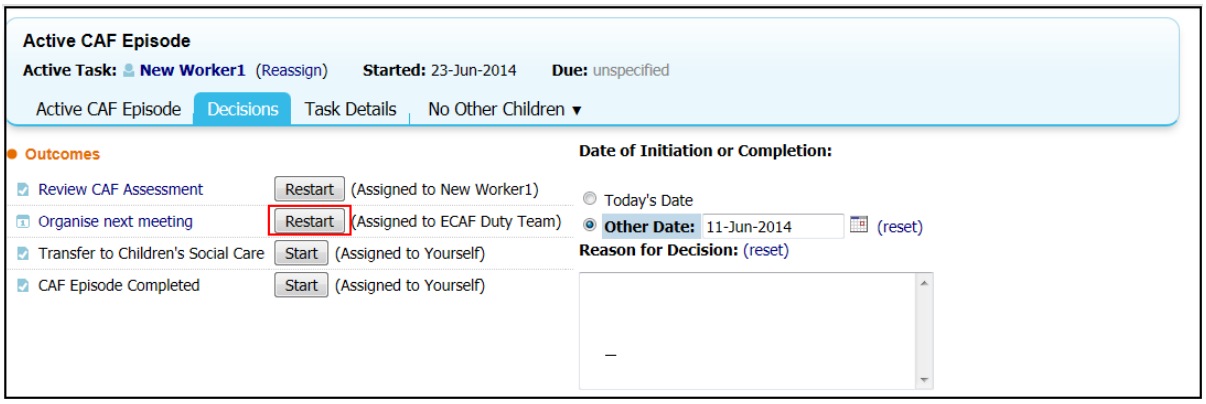
1. From the Active Episode Decisions tab click **Start** or **Restart** next to the **Review CAF Assessment** outcome




**NOTE**: Please refer to the CAF Assessment section in this document for further details.

## *Organise next Meeting decision*

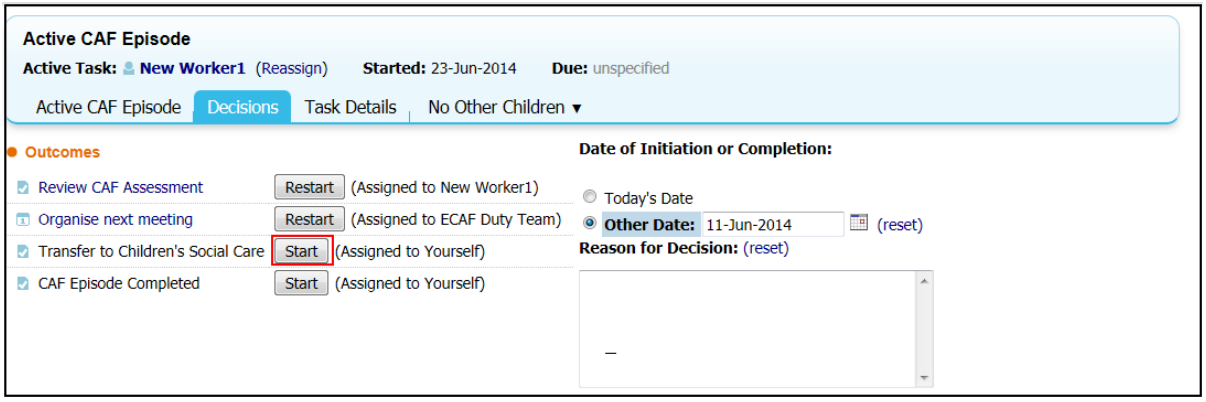
1. From the Active Episode Decisions tab click **Start** or **Restart** next to the **Organise next Meeting** outcome




**NOTE**: Please refer to the Meeting section in this document for further details.

## *Transfer to ics decision*

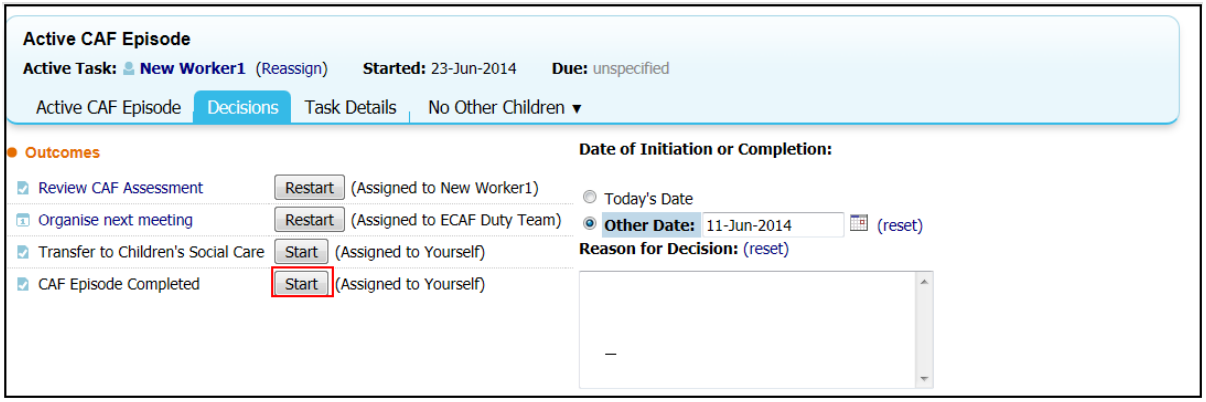
1. From the Active Episode Decisions tab click **Start** or **Restart** next to the **Transfer to ics** outcome




**NOTE**: Please refer to the **Transfer to ics** section in this document for further details.

## *Episode Completed decision*

1. From the Active Episode Decisions tab click **Start** or **Restart** next to the **Episode Completed** outcome

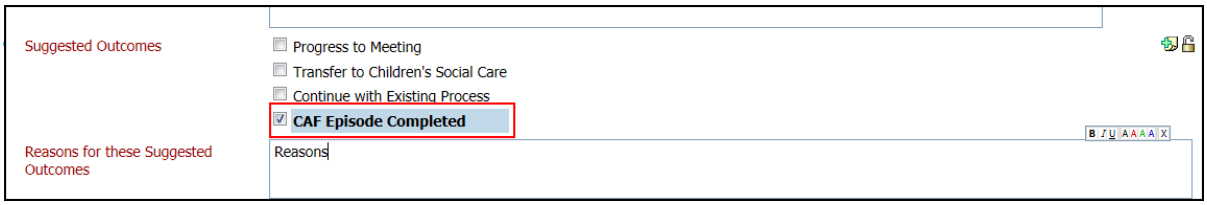



**NOTE**: Please refer to the **Episode Completed** section in this document for further details.

# CAF Outcome – Episode Completed

If no further activity is required in relation to a current episode in EHM, the Episode Coordinator can complete the episode. The completion of an EHM Episode will prevent the episode coordinator from starting any further CAF Assessments

1. Select the **Episode Completed** Outcome from the CAF assessment or Meeting outcome

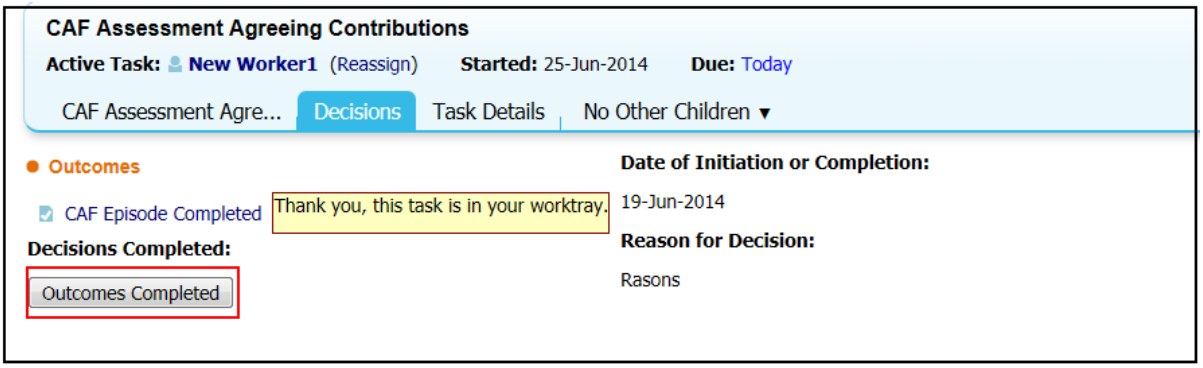



**TIP**: Alternatively this may be selected as an outcome from the **Active Episode Decisions** tab.

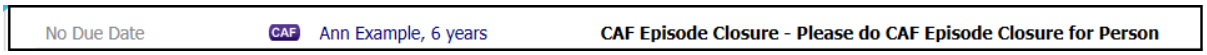
2. Once authorised, click **Start** next to the **Episode Completed** outcome and **OK** to confirm

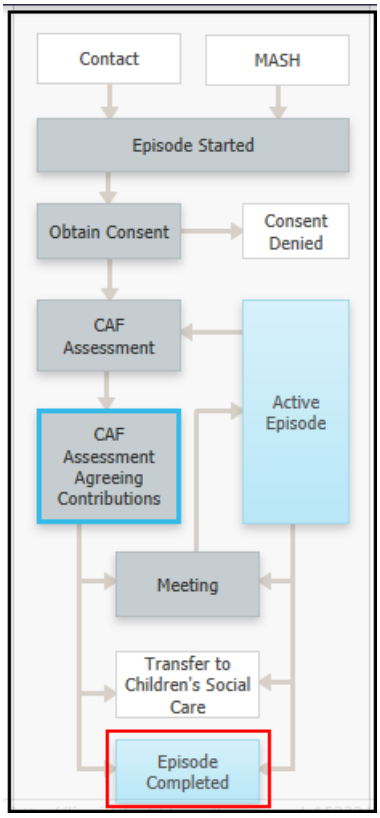
CAF Assessment Agreeing Contributions
Active Task: New Worker1 (Reassign) Started: 25-Jun-2014 Due: Today
CAF Assessment Agre... Decisions Task Details No Other Children
Outcomes
CAF Episode Completed Start (Assigned to Yourself)
Date of Initiation or Completion:
19-Jun-2014
Reason for Decision:
Rasons

3. Click **Outcomes Completed** and **OK** to confirm

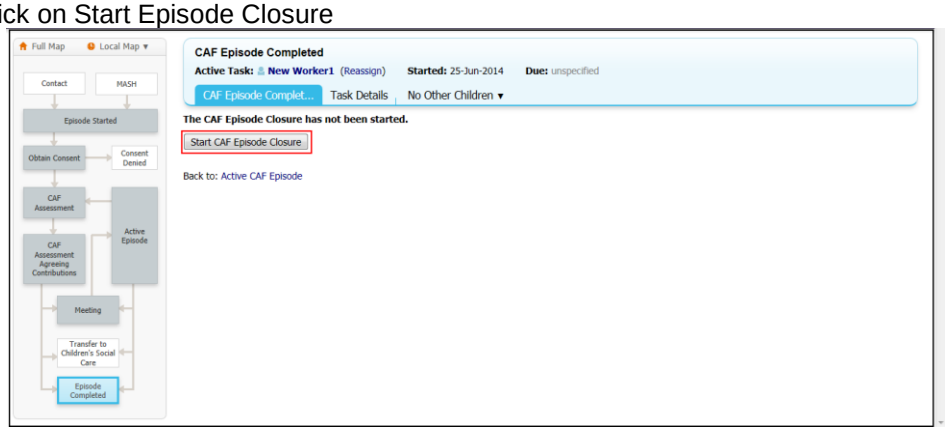

CAF Assessment Agreeing Contributions
Active Task: New Worker1 (Reassign) Started: 25-Jun-2014 Due: Today
CAF Assessment Agre... Decisions Task Details No Other Children
Outcomes
CAF Episode Completed
Thank you, this task is in your worktray.
Decisions Completed:
Outcomes Completed
Date of Initiation or Completion:
19-Jun-2014
Reason for Decision:
Rasons

The **Episode Completed** stage on the EHM pathway is activated and a corresponding task will be generated in the Episode Coordinator's worktray:

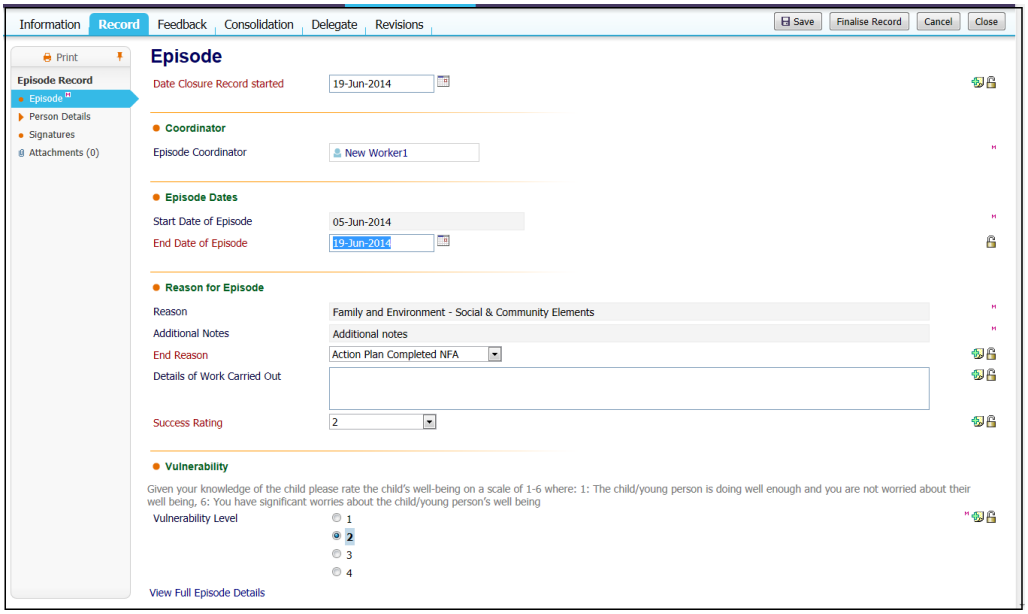





4. Select the Episode Completed task or box from the Case Pathway (as above)
5. Click on Start Episode Closure



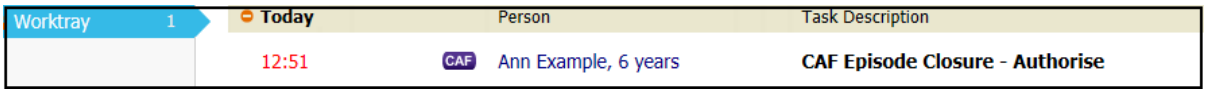

6. Enter **End Date**
7. Select the **End Reason** from the picklist
8. Enter **Details of work carried out** and select the **Success Rating** from the picklist
9. Select the **Final Vulnerability Level** and click **Finalise Record**
10. **Click** OK **to Confirm**



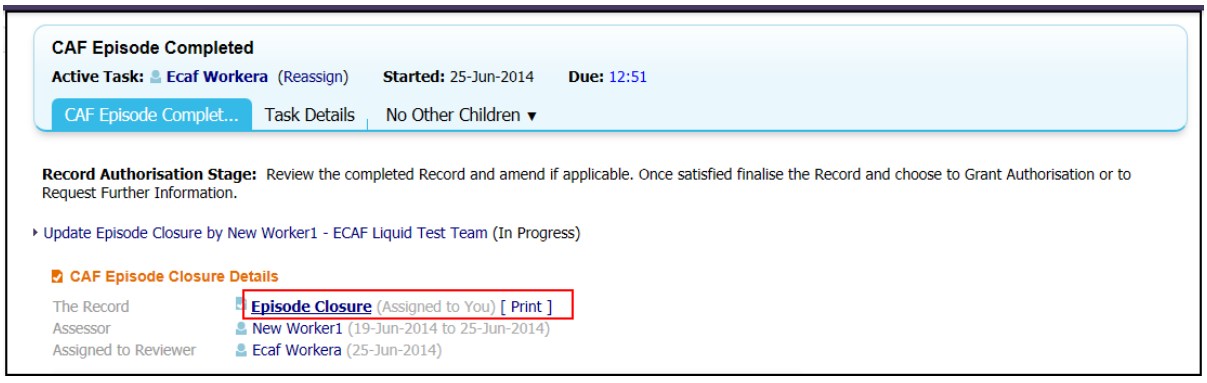

Note: Depending on customer Configuration. The Episode Closure record will be sent for authorisation. See example below

1. Select who to authorise and Click **Assign**

2. Click on the task from the worktray (person authorising record)



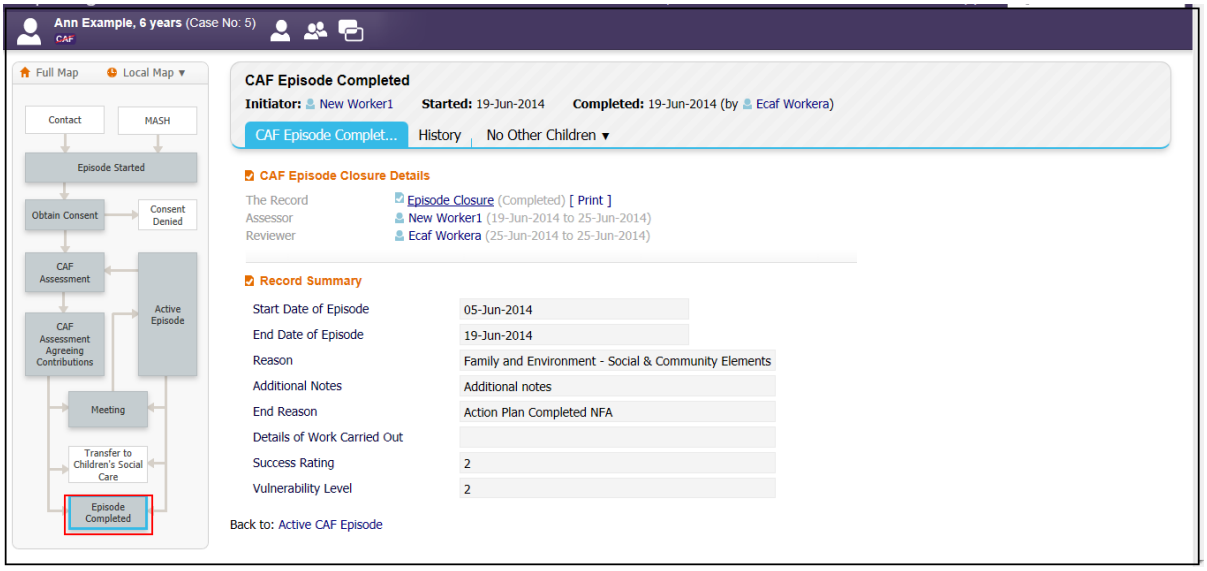

3. Click on Hyperlink to open record
4. Review record and Click **Finalise Record**


CAF Episode Completed
Active Task: Ecaf Workera (Reassign)
Started: 25-Jun-2014
Due: 12:51
CAF Episode Complet...
Task Details
No Other Children
Record Authorisation Stage: Review the completed Record and amend if applicable. Once satisfied finalise the Record and choose to Grant Authorisation or to Request Further Information.
Update Episode Closure by New Worker1 - ECAF Liquid Test Team (In Progress)
CAF Episode Closure Details
The Record
Episode Closure (Assigned to You) [ Print ]
Assessor
New Worker1 (19-Jun-2014 to 25-Jun-2014)
Assigned to Reviewer
Ecaf Workera (25-Jun-2014)

**5.** Click on **Authorise**

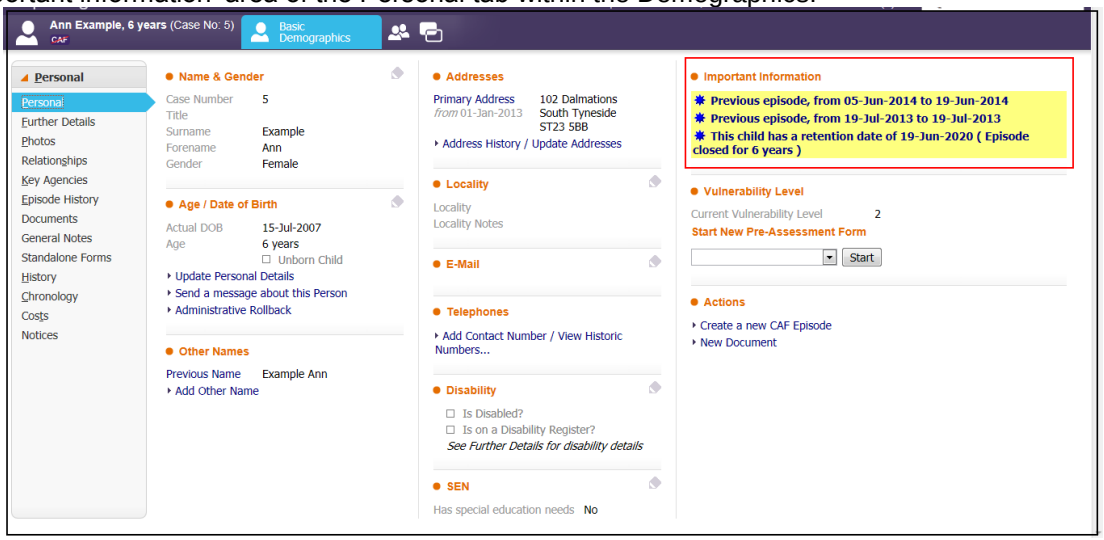
CAF Episode Completed
Active Task: Ecaf Workera (Reassign) Started: 25-Jun-2014 Due: 12:51
CAF Episode Complet... Task Details No Other Children
Record Authorisation Stage: Review the completed Record and amend if applicable. Once satisfied finalise the Record and choose to Grant Authorisation or to Request Further Information.
Authorise
Request Further Information
View Episode Closure by New Worker1 - ECAF Liquid Test Team (Awaiting Authorisation)
Amend
CAF Episode Closure Details
The Record
Episode Closure (Session Finalised) [ Print ]
Assessor
New Worker1 (19-Jun-2014 to 25-Jun-2014)
Reviewer
Ecaf Workera (25-Jun-2014 to 25-Jun-2014)

The EHM Episode has now been completed, and the episode pathway will automatically update to reflect this.




## *Recording an EHM Retention record*

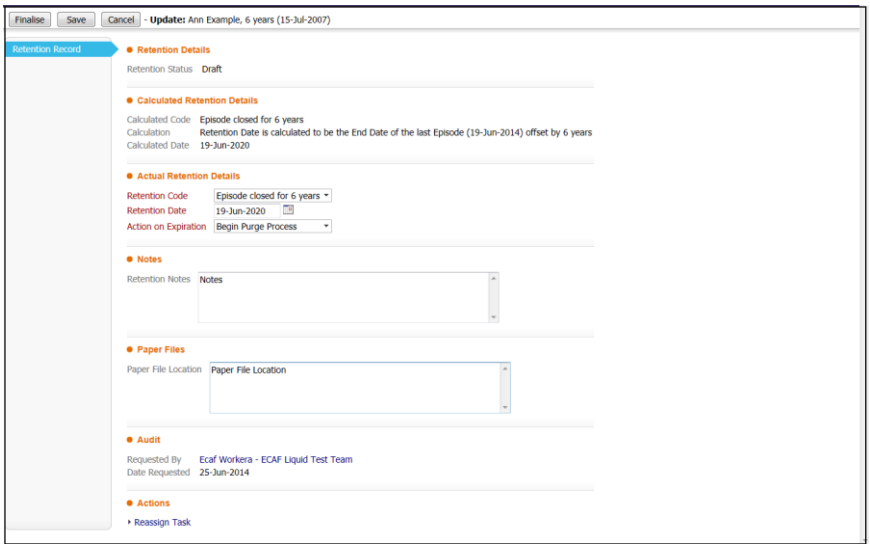
Once an EHM Episode is completed a task will be generated to record the retention details. Both the fact that the episode is completed and that the child has a retention date will be highlighted within the 'Important information' area of the Personal tab within the Demographics:



1. Select the **Retention – Update the Retention Schedule** task from the worktray

2. Record the Retention details such as action on expiration, notes and paper file location, as required and then click **Finalise**

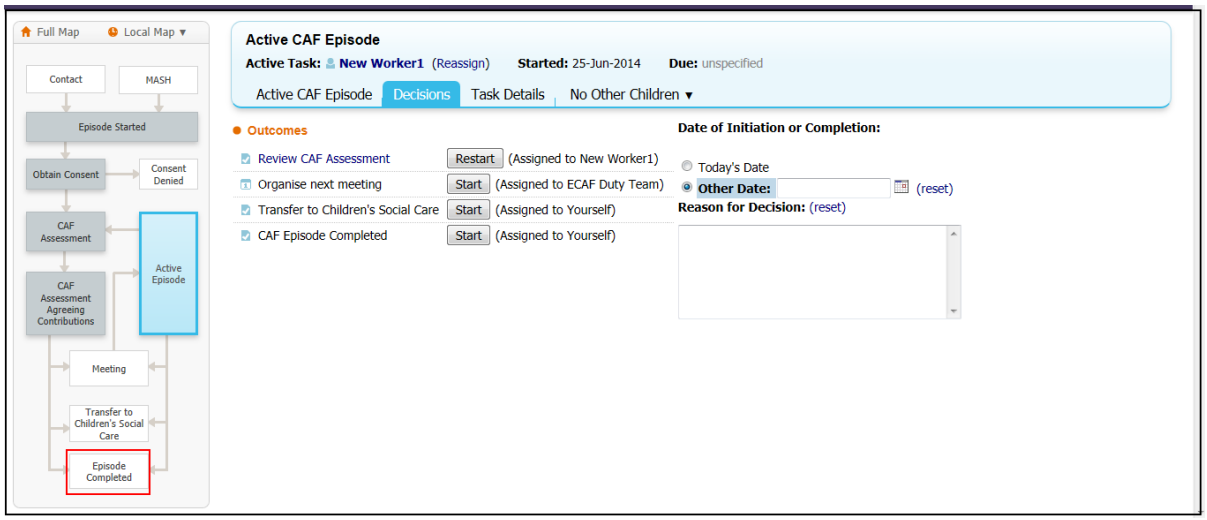
**TIP**: The default Retention Code and Date can be adjusted if required before clicking Finalise. Finalised Retention details can be accessed and updated from the **Further Details** tab:


Finalise
Save
Cancel
- Update: Ann Example, 6 years (15-Jul-2007)
Retention Record
Retention Details
Retention Status Draft
Calculated Retention Details
Calculated Code Episode closed for 6 years
Calculation Retention Date is calculated to be the End Date of the last Episode (19-Jun-2014) offset by 6 years
Calculated Date 19-Jun-2020
Actual Retention Details
Retention Code Episode closed for 6 years
Retention Date 19-Jun-2020
Action on Expiration Begin Purge Process
Notes
Retention Notes Notes
Paper Files
Paper File Location Paper File Location
Audit
Requested By Ecaf Workera - ECAF Liquid Test Team
Date Requested 25-Jun-2014
Actions
Reassign Task

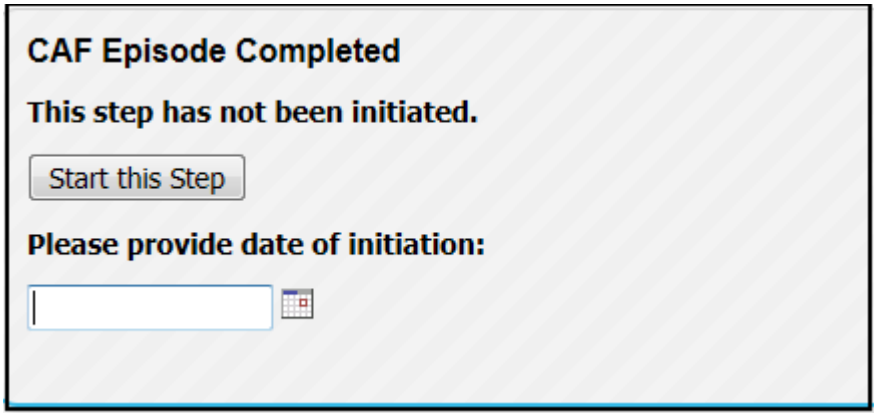
## *Manually ending an EHM Episode*

An active EHM episode may be ended manually, if required. For example if a record has been transferred to ics the episode may need to be eventually ended in EHM.

1. From the case pathway select the **Episode Completed** box




2. Enter the **date** of initiating the Episode Closure and **reasons** for starting this step manually
3. Click **Start this Step**

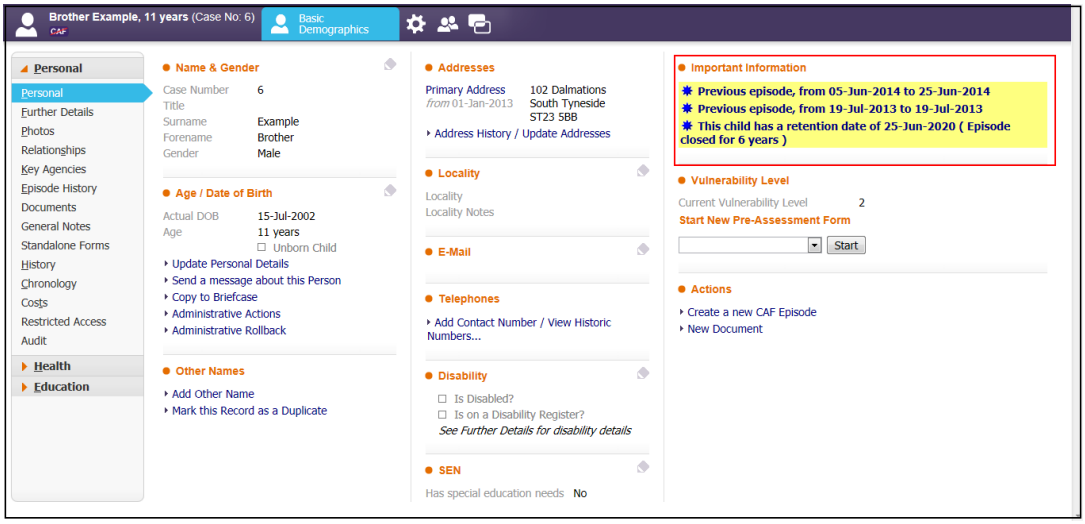


The Episode Completed details will be displayed. Please refer to the earlier **CAF Outcome – Episode Completed** section in this document for further information.

## *Viewing Previous EHM Episodes*

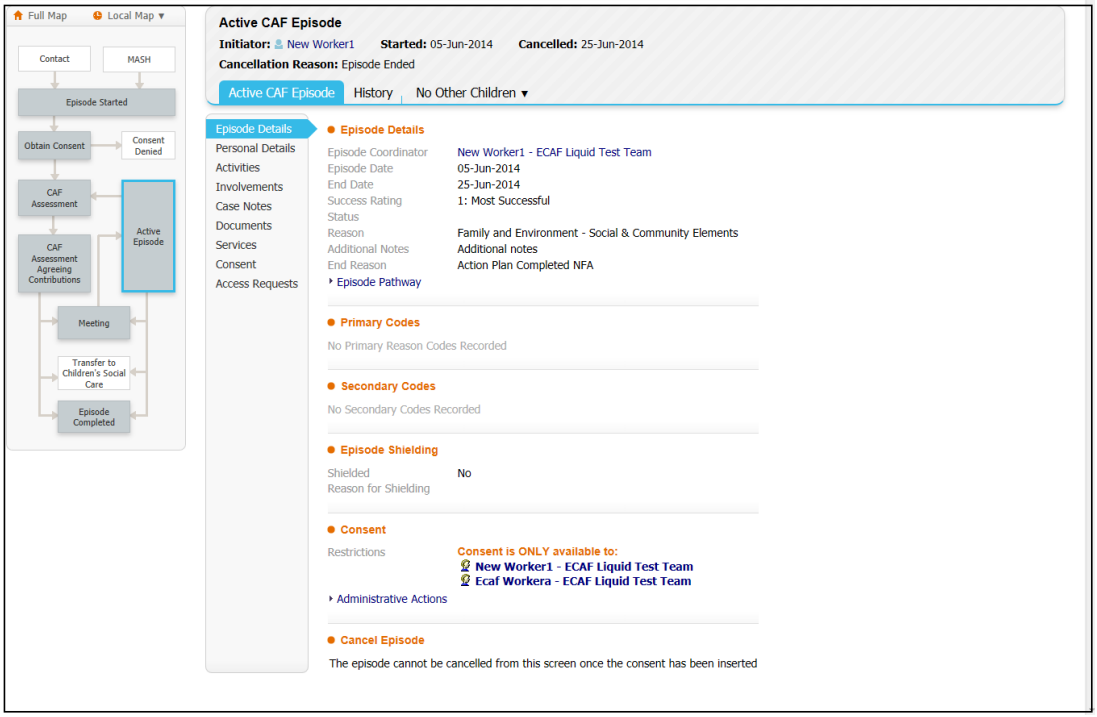
All previous EHM episodes are highlighted on the child/ young person's demographics record.

1. Click on the **Previous episode** link from under the **Important Information** section on the Personal tab




The EHM Episode Completed pathway will be displayed. The Episode Details tabs can also be accessed as read-only from here:

**NOTE**: Please refer to the **EHM – Episode Details** document for more information.

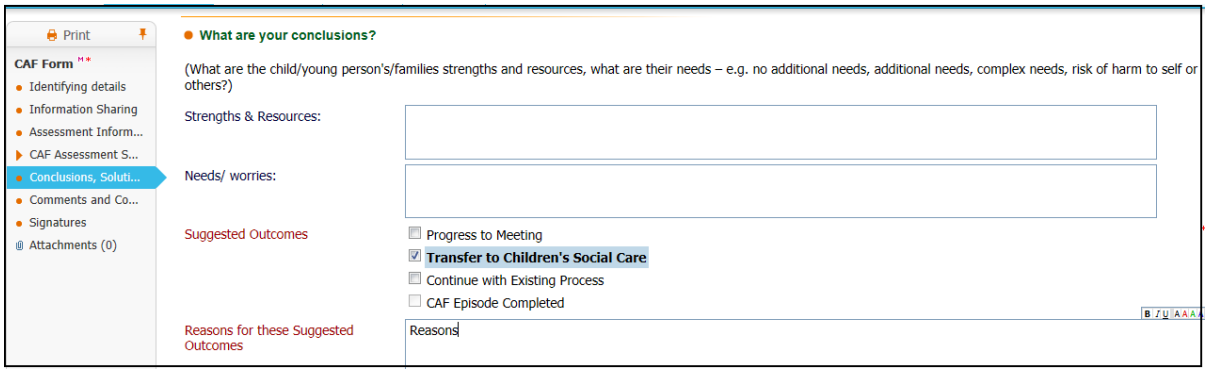


# CAF Outcome – Transfer to ics

**NOTE**: This outcome may not be available in your local EHM customer configuration. The Transfer to ics outcome is only fully compatible with the ics system. Please refer to your Liquidlogic Project Manager for further details.

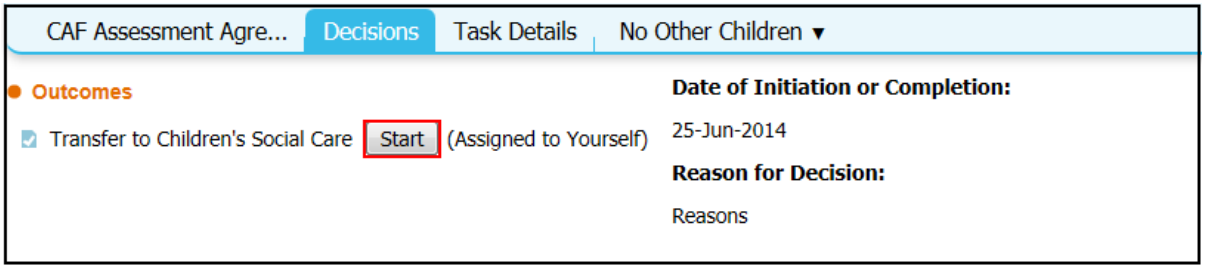
Following the CAF Assessment or meeting the child/young person's episode may need to be transferred to the Integrated Children's System (ics). This may also be started as an outcome from the Decisions tab of the active CAF episode.

1. Select the **Transfer to ics** outcome from the CAF assessment

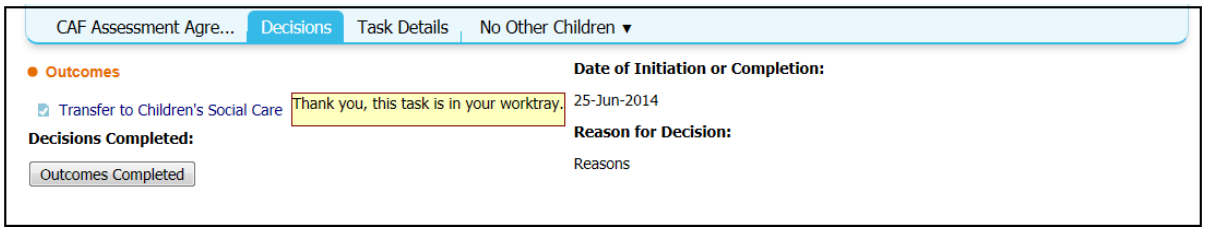



**TIP**: Alternatively this may be selected as an outcome from the **Active Episode Decisions** tab.

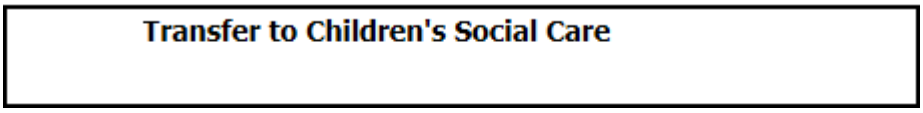
2. Once authorised, click **Start** next to the **Transfer to ics** outcome and **OK** to confirm

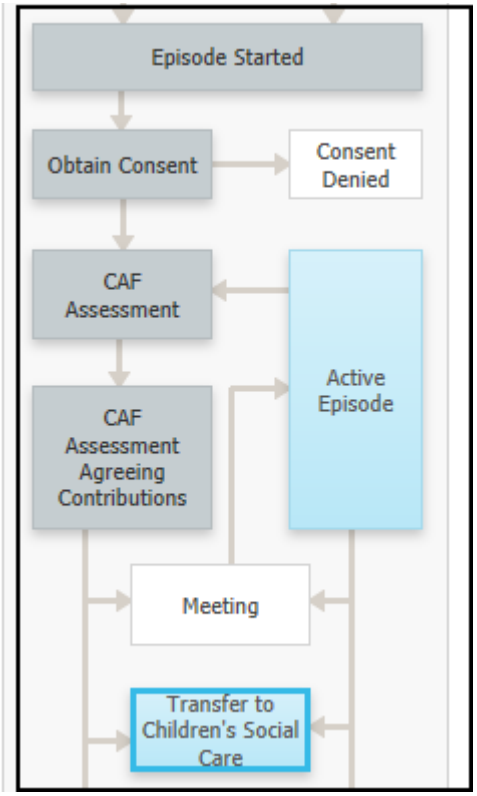


3. Click **Outcomes Completed** and **OK** to confirm



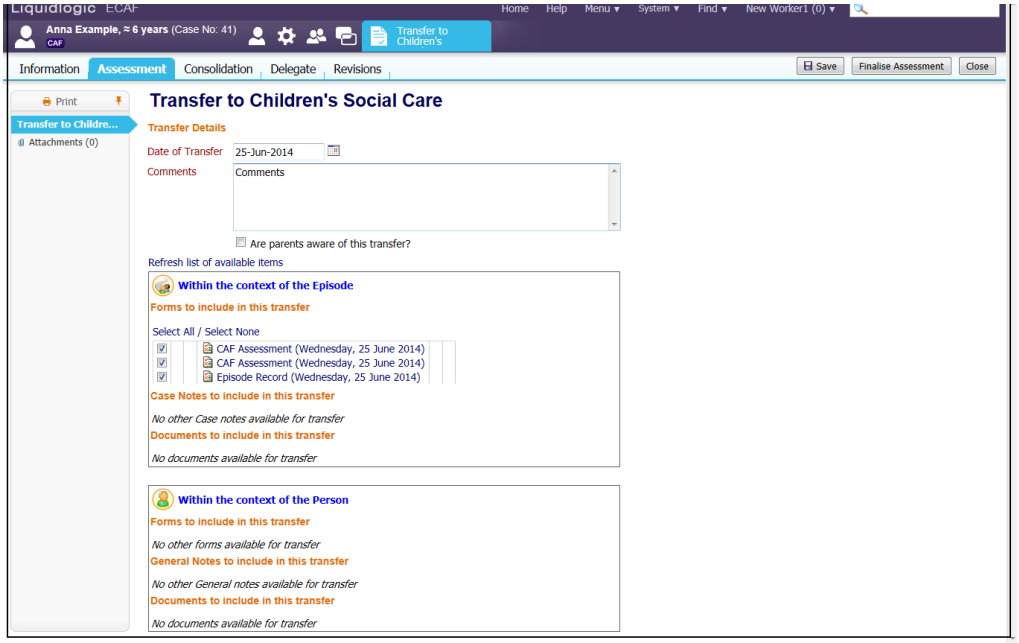

The **Transfer to ics** stage on the EHM pathway is activated and a corresponding task will be generated in the Episode Coordinator's worktray:



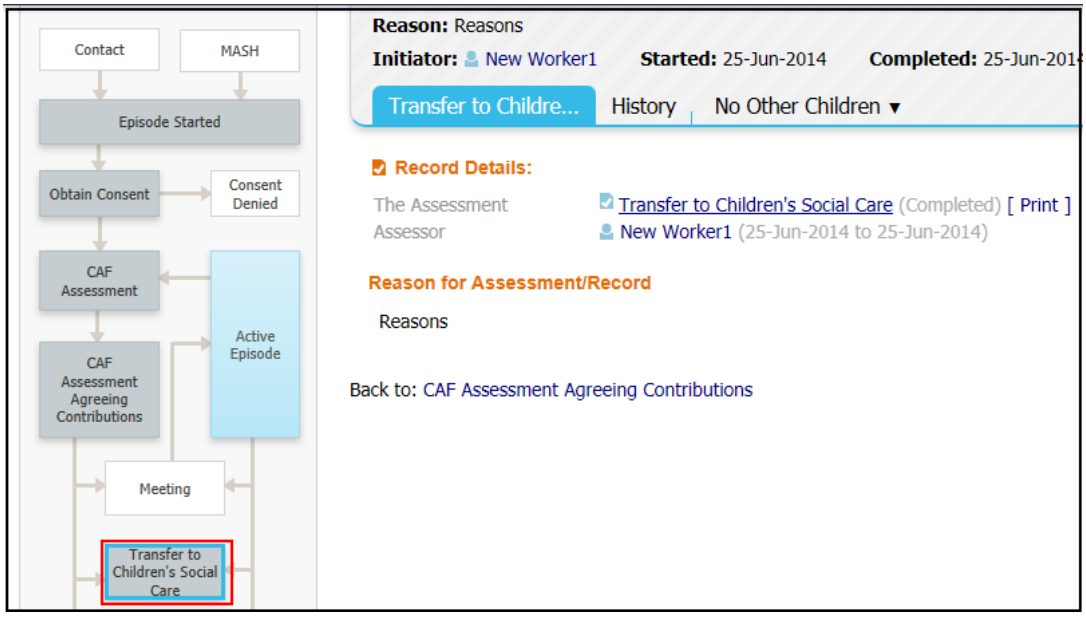

4. Select the **Transfer to ics** task or box from the Case Pathway (as above)

5. Click **Create Form**
6. Copy assessment forward if required or start blank
7. Enter **Transfer Date**
8. Select the check boxes of  any forms, documents or case notes that you wish to transfer




9. Click **Finalise Assessment**
10. Click **Ok to** confirm

This will complete the Transfer to ics process on the Case Pathway:

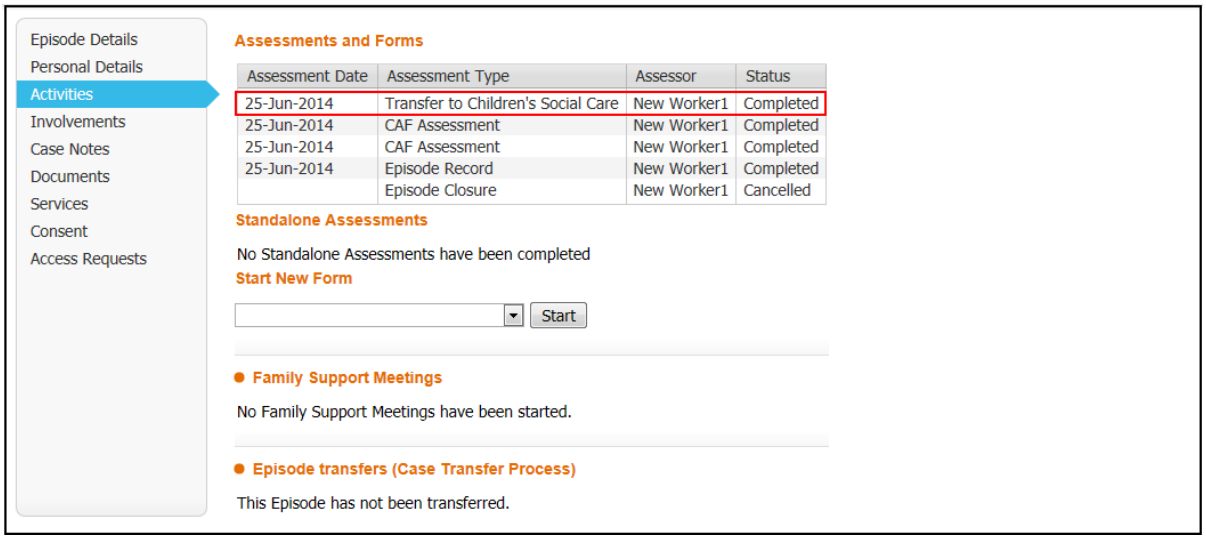


Once a child/young person's record has been transferred to ics this will be identified in the Important Information area of their Personal tab:

**NOTE**: the episode will still remain active within the EHM system.

**TIP:** The Episode Closure step can be started manually if the episode should also be ended in the EHM system. Please refer to the **'Manually ending an EHM Episode'** section in this document for details.

The **Activities** tab on the EHM Episode will be automatically updated to reflect the episode has been transferred to ics.



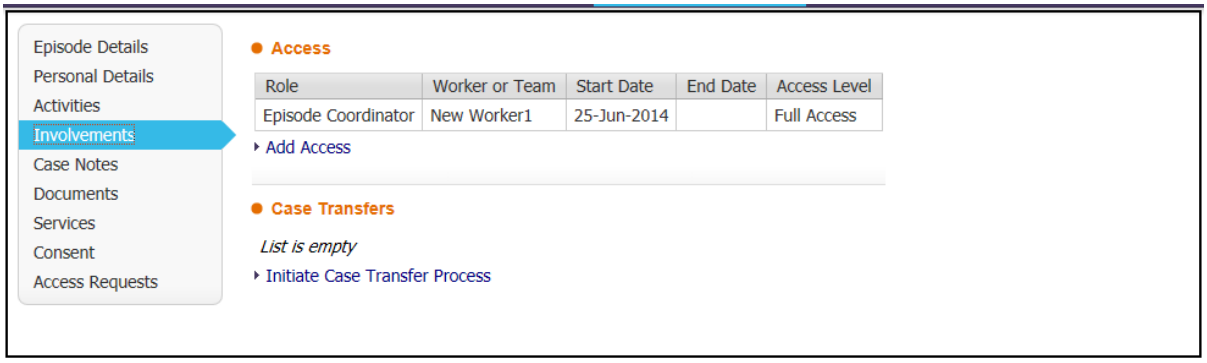

Please refer to the EHM / ics Transfers User Manual for the full process of transferring from EHM to ics

# Initiate Case Transfer Process

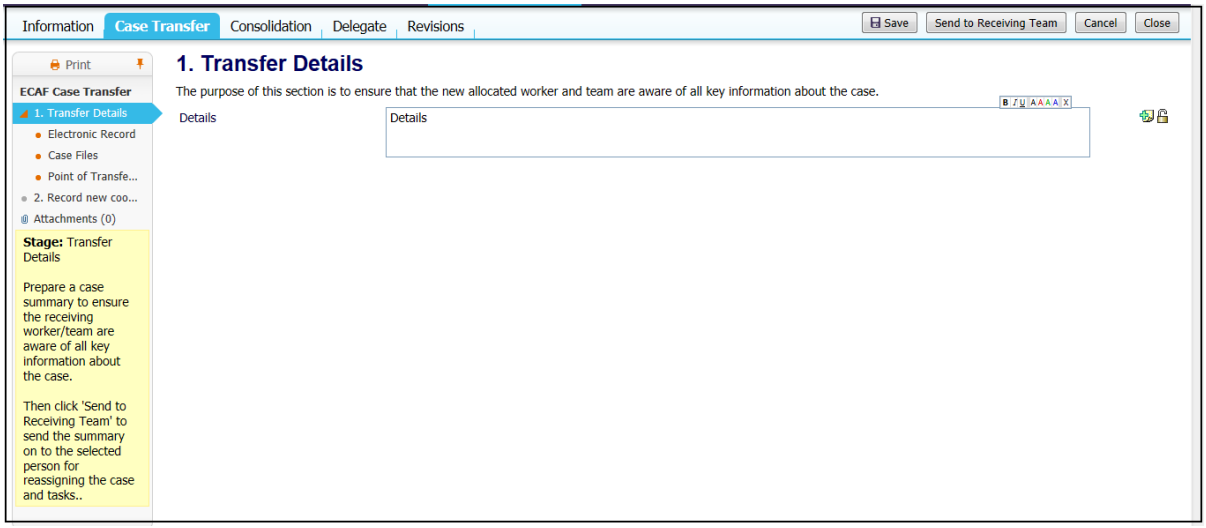
If the role of the EHM Episode Coordinator is to be transferred to another professional in a different team the case transfer process can be initiated from the **Involvements** Tab on the Current Episode Details.

**NOTE**: The facility to 'Initiate the Case Transfer Process' within EHM is only available to users with the necessary access rights. Please refer to your EHM Systems Administrator for further guidance.

1. Navigate to the Current Episode and select the **Involvements** Tab
2. Click **Initiate Case Transfer Process**



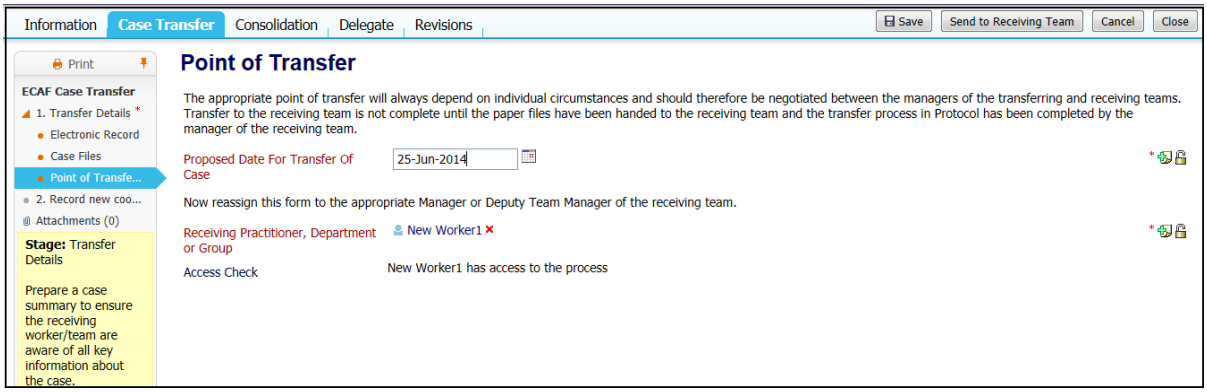

The **EHM Case Transfer** form will appear.


Information
Case Transfer
Consolidation
Delegate
Revisions
Save
Send to Receiving Team
Cancel
Close
Print
ECAF Case Transfer
1. Transfer Details
Electronic Record
Case Files
Point of Transfe...
2. Record new coo...
Attachments (0)
Stage: Transfer Details
Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.
Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks..
1. Transfer Details
The purpose of this section is to ensure that the new allocated worker and team are aware of all key information about the case.
Details
Details

3. Select the **Transfer Details** section and complete the necessary fields

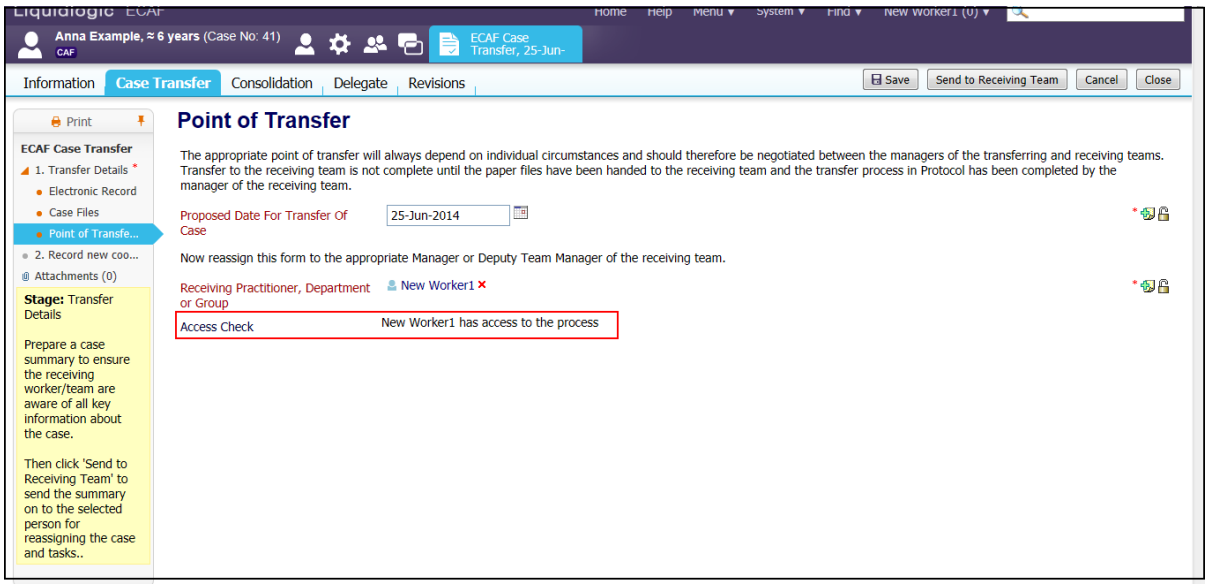
**TIP**: There are mandatory fields within the **Point of Transfer** domain which must be completed

4. Enter **Proposed Date for Transfer of Case**
5. Select **Click here to select a user**….to specify the **Receiving Team** or Deputy Team Manager from the Address Book

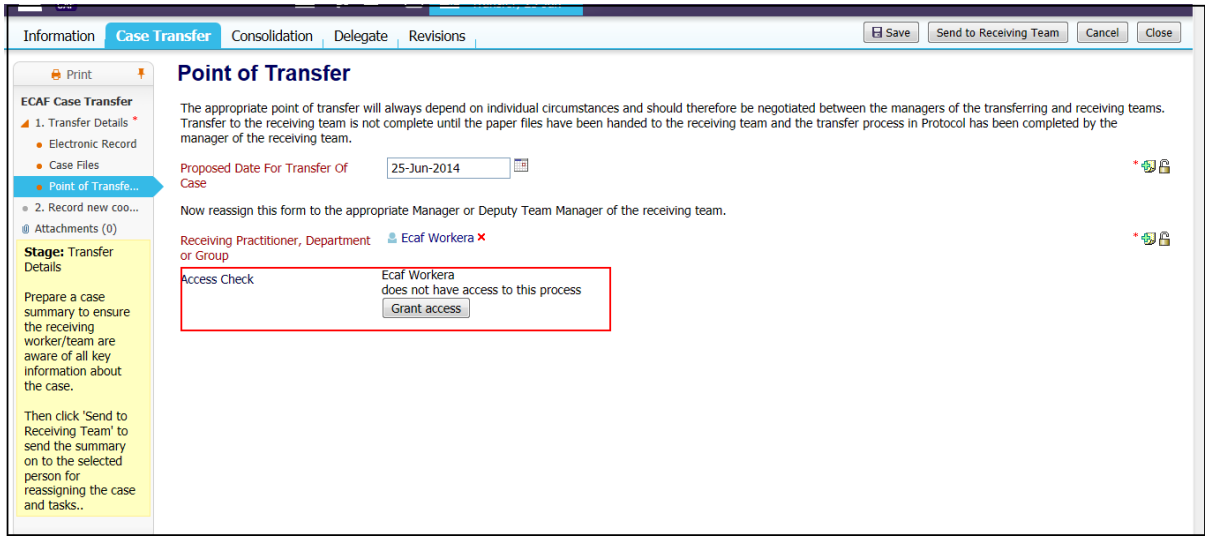

Information
Case Transfer
Consolidation
Delegate
Revisions
Save
Send to Receiving Team
Cancel
Close
Print
ECAF Case Transfer
1. Transfer Details *
Electronic Record
Case Files
Point of Transfe...
2. Record new coo...
Attachments (0)
Stage: Transfer Details
Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.
Point of Transfer
The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.
Proposed Date For Transfer Of Case
25-Jun-2014
Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.
Receiving Practitioner, Department or Group
New Worker1
Access Check
New Worker1 has access to the process

**NOTE**: For further guidance on using the Address Book refer to the **EHM General** User Manual.

If the user which is selected as the Receiving Team/Deputy Team Manager has access to the Case Transfer process and the current episode the access check will be positive, below.


Anna Example, ≈ 6 years (Case No: 41)
CAF
ECAF Case Transfer, 25-Jun-
Information
Case Transfer
Consolidation
Delegate
Revisions
Save
Send to Receiving Team
Cancel
Close
Print
ECAF Case Transfer
1. Transfer Details *
Electronic Record
Case Files
Point of Transfe...
2. Record new coo...
Attachments (0)
Stage: Transfer Details
Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.
Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks..
Point of Transfer
The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.
Proposed Date For Transfer Of Case
25-Jun-2014
Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.
Receiving Practitioner, Department or Group
New Worker1
Access Check
New Worker1 has access to the process

If the user which is selected as the Receiving Team/Deputy Team Manager does not have access to the Case Transfer process and the current episode the particular user can be granted access:

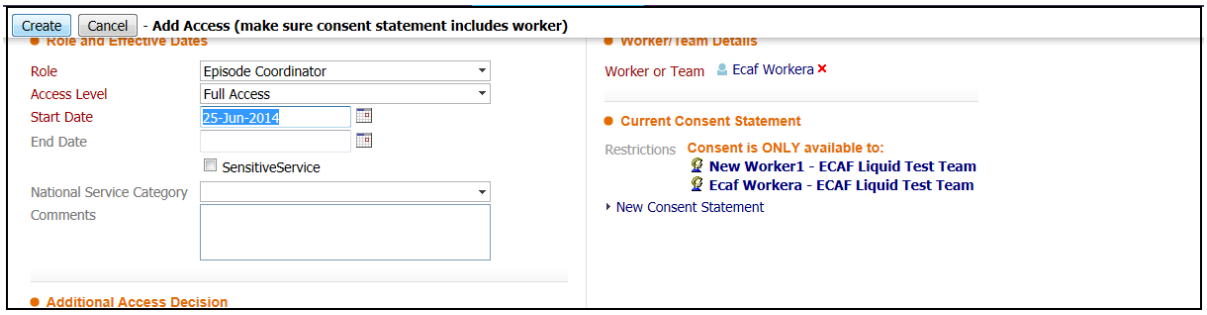

Information
Case Transfer
Consolidation
Delegate
Revisions
Save
Send to Receiving Team
Cancel
Close
Print
ECAF Case Transfer
1. Transfer Details *
Electronic Record
Case Files
Point of Transfe...
2. Record new coo...
Attachments (0)
Stage: Transfer Details
Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.
Then click 'Send to Receiving Team' to send the summary on to the selected person for reassigning the case and tasks..
Point of Transfer
The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.
Proposed Date For Transfer Of Case
25-Jun-2014
Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.
Receiving Practitioner, Department or Group
Ecaf Workera
Access Check
Ecaf Workera
does not have access to this process
Grant access

6. Click **Grant Access**

The current consent statement will be shown, if the selected worker is granted access under the current consent statement continue to Step 9.

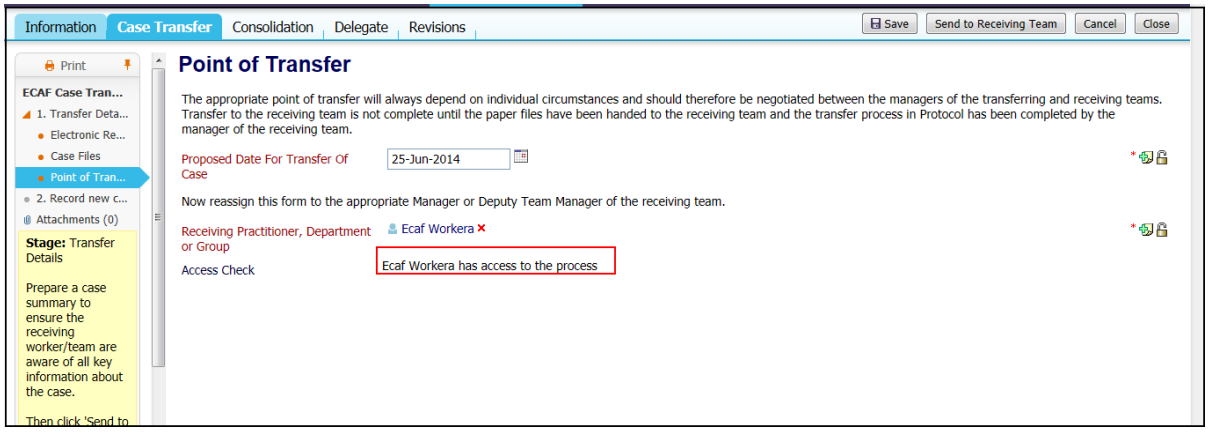
If the selected worker is not recorded as having access under the current consent statement then a **new consent statement** will need to be created to include the selected worker. For further guidance on consent statements refer to the **Obtain Consent** section in this manual.

7. Choose **Role** and **Access Level** from drop down lists provided
8. Click **Create**




The Receiving Team/Deputy Team Manager selected will now have sufficient access to receive the case transfer task.

9. Click **Save Changes** and then **Send to Receiving Team**

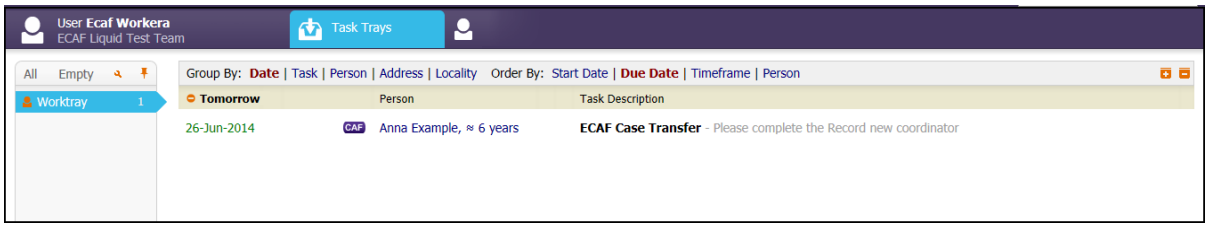

Information
Case Transfer
Consolidation
Delegate
Revisions
Save
Send to Receiving Team
Cancel
Close
Print
ECAF Case Tran...
1. Transfer Deta...
Electronic Re...
Case Files
Point of Tran...
2. Record new c...
Attachments (0)
Stage: Transfer Details
Prepare a case summary to ensure the receiving worker/team are aware of all key information about the case.
Point of Transfer
The appropriate point of transfer will always depend on individual circumstances and should therefore be negotiated between the managers of the transferring and receiving teams. Transfer to the receiving team is not complete until the paper files have been handed to the receiving team and the transfer process in Protocol has been completed by the manager of the receiving team.
Proposed Date For Transfer Of Case
25-Jun-2014
Now reassign this form to the appropriate Manager or Deputy Team Manager of the receiving team.
Receiving Practitioner, Department or Group
Ecaf Workera
Access Check
Ecaf Workera has access to the process

10. Click **OK**

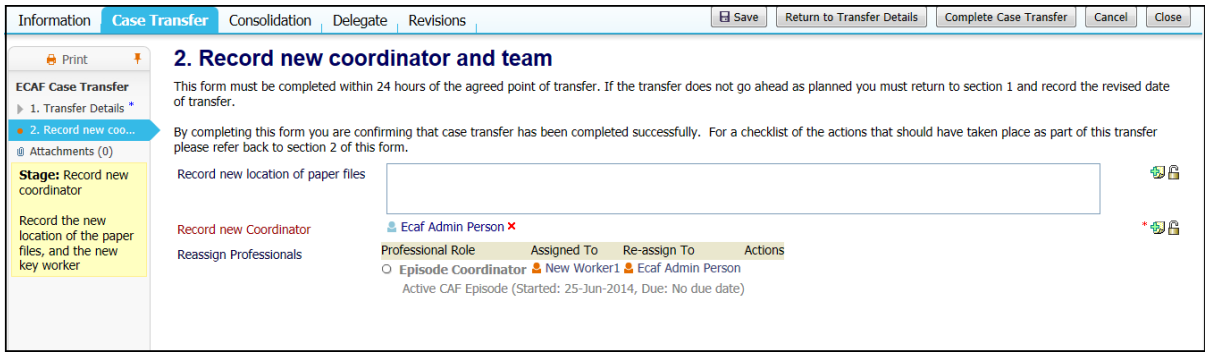
The case transfer task will now be sent to the Receiving Team/Deputy Team Manager to action.

## *Complete Case Transfer Process*

1. The Receiving Team/Deputy Team Manager must select the task **EHM Case Transfer** from the work tray




2. Review the information contained within the Transfer Details section of the EHM Case Transfer form
3. Select **Click here to select a user**… in order to record the new **Coordinator**


Information
Case Transfer
Consolidation
Delegate
Revisions
Save
Return to Transfer Details
Complete Case Transfer
Cancel
Close
Print
ECAF Case Transfer
1. Transfer Details *
2. Record new coo...
Attachments (0)
Stage: Record new coordinator
Record the new location of the paper files, and the new key worker
2. Record new coordinator and team
This form must be completed within 24 hours of the agreed point of transfer. If the transfer does not go ahead as planned you must return to section 1 and record the revised date of transfer.
By completing this form you are confirming that case transfer has been completed successfully. For a checklist of the actions that should have taken place as part of this transfer please refer back to section 2 of this form.
Record new location of paper files
Record new Coordinator
Ecaf Admin Person
Reassign Professionals
Professional Role
Assigned To
Re-assign To
Actions
Episode Coordinator
New Worker1
Ecaf Admin Person
Active CAF Episode (Started: 25-Jun-2014, Due: No due date)

**TIP**: If the chosen **new coordinator** does not have access to the current episode, access will need to be granted by clicking **Grant Access**.

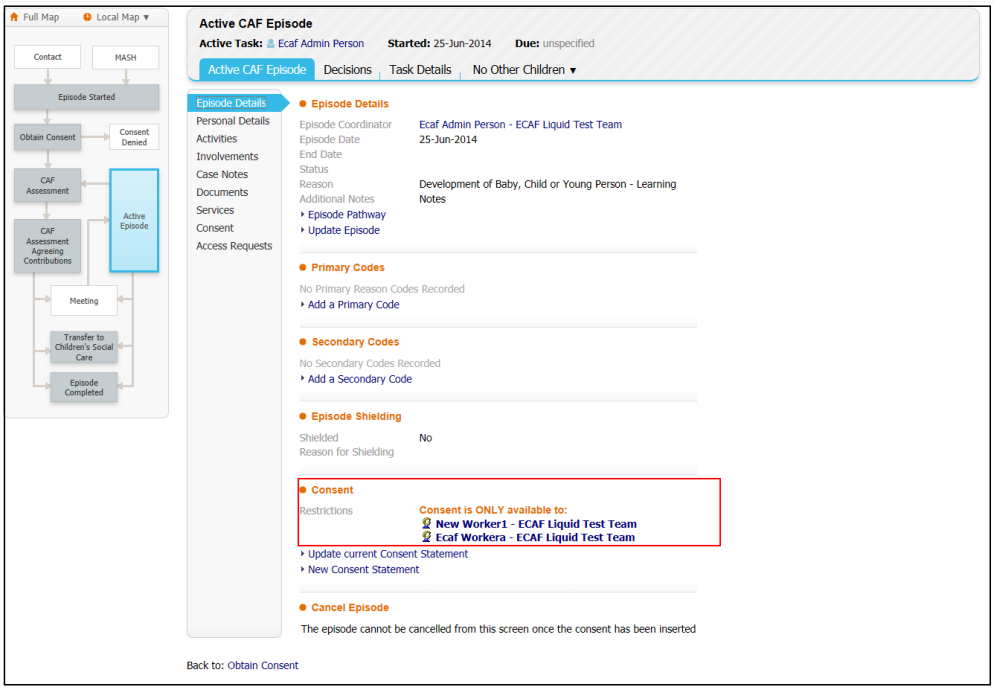
4. Once the chosen **new coordinator** does have access to the current episode, then click **Complete Case Transfer**

All tasks assigned to the previous Episode Coordinator prior to the completion of the case transfer process will automatically be assigned to the new Episode Coordinator. The involvements tab on the current episode will also reflect the Episode Coordinator having been changed.

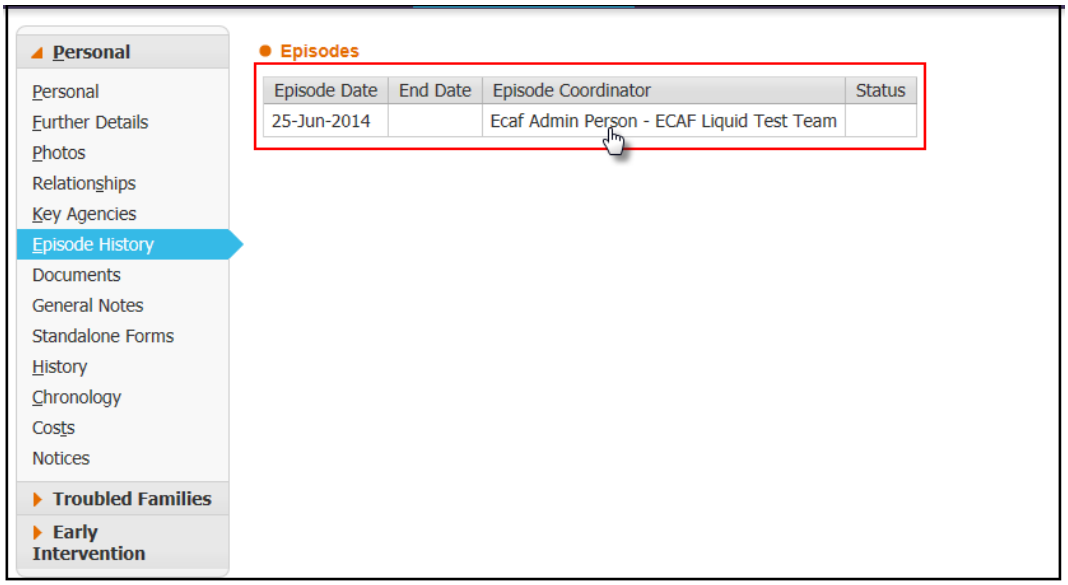
## *Requesting Access to EHM Records*

If the Current Consent Statement linked to the active EHM Episode does not allow a user to have access then a user can request access to the episode by carrying out the following steps.

In this example; the current consent statement does not allow 'Ecaf Manager1' access to the child (Anna Example)'s current EHM Episode. The user 'Ecaf Manager1'' would therefore need to request access to the EHM Episode.

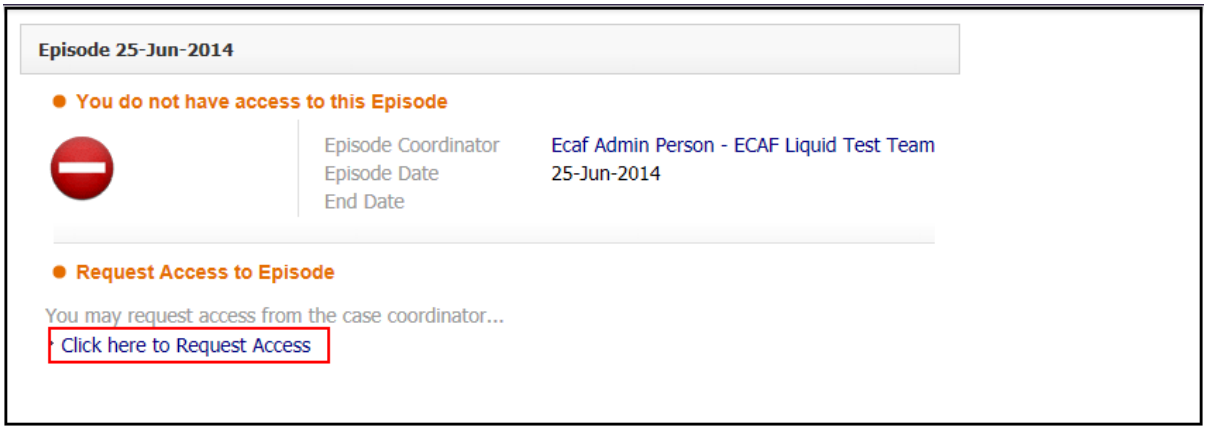



If another user tries to select an episode which they do not have access to, as shown in the example below where Social Worker 1 is trying to access the episode for Emma Smith…

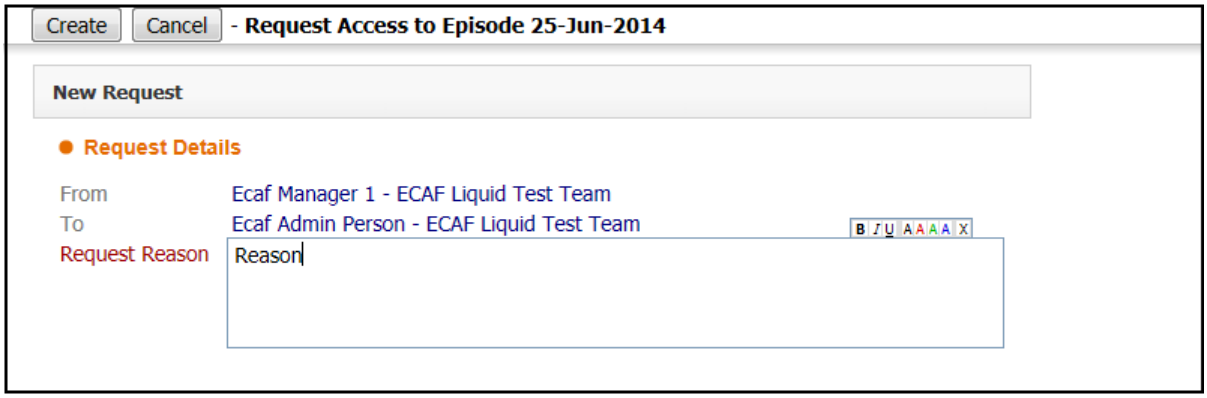



The user will be presented with the following warning to illustrate that they do not have access to the selected episode:

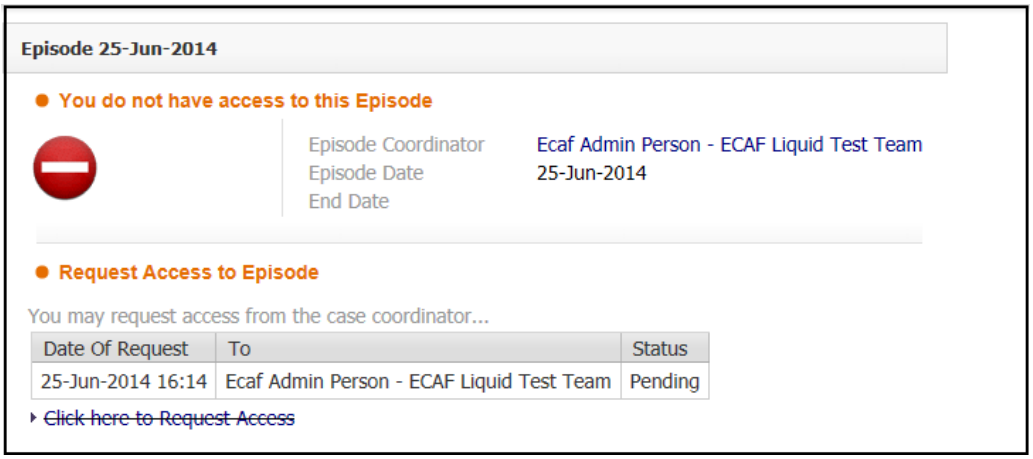
5. Select the link **Click here to Request Access**


Episode 25-Jun-2014
You do not have access to this Episode
Episode Coordinator
Episode Date
End Date
Ecaf Admin Person - ECAF Liquid Test Team
25-Jun-2014
Request Access to Episode
You may request access from the case coordinator...
Click here to Request Access

6. Enter the **Request Reason** and then click **Create**




The access request will be sent to the episode coordinator to review, in the meantime the request has a status set to **Pending**.



## *Email Notifications*

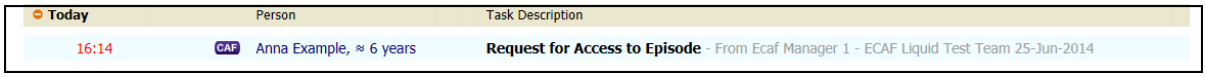
If the episode coordinator has a valid email address recorded on their professional profile within EHM then the system can send a notification of the access request via email to the episode coordinator. Please note that Access Requests cannot be Approved/Rejected from your email, access requests can only be dealt with in EHM.

For further guidance on adding an email to **Your Profile** and configuring email notifications please refer to the **EHM General** User Manual and speak to your Liquidlogic Project Manager.

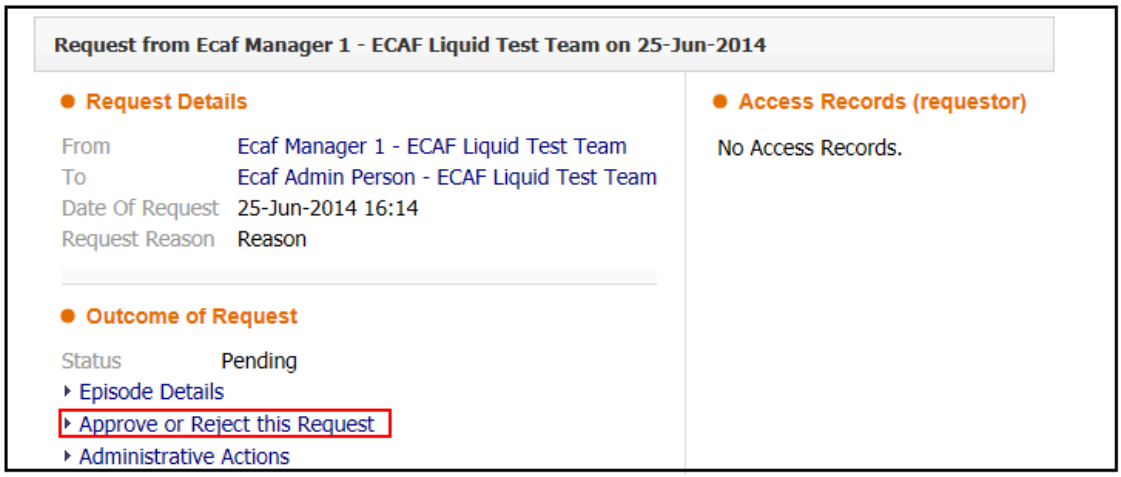
## *Approving Requests*

The episode coordinator will receive a task in their work tray for the access request.

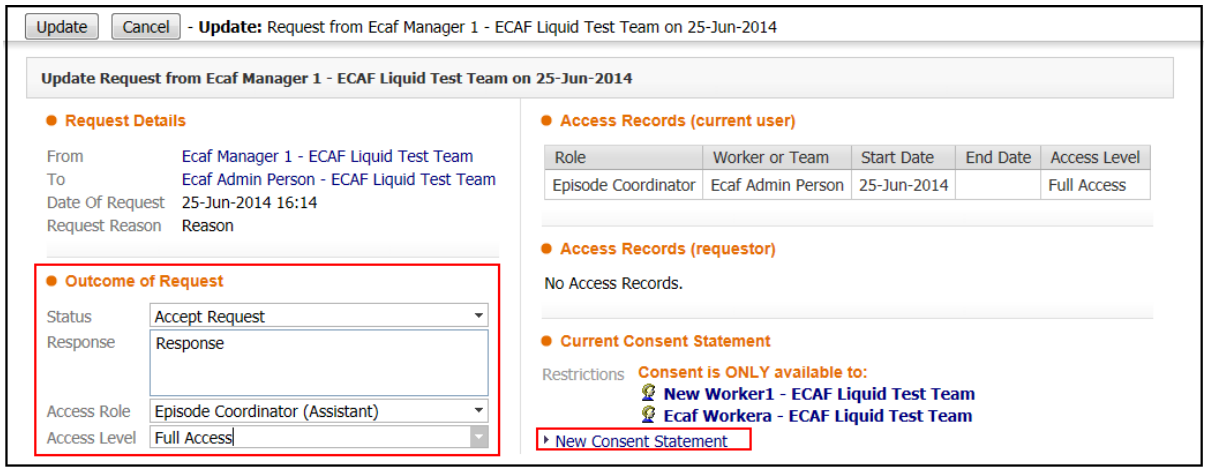
1. Select the task **Request for Access to Episode** from the work tray




2. The episode coordinator would review the access request and then record the response by clicking the **Approve or Reject this Request** link


Request from Ecaf Manager 1 - ECAF Liquid Test Team on 25-Jun-2014
Request Details
From Ecaf Manager 1 - ECAF Liquid Test Team
To Ecaf Admin Person - ECAF Liquid Test Team
Date Of Request 25-Jun-2014 16:14
Request Reason Reason
Access Records (requestor)
No Access Records.
Outcome of Request
Status Pending
Episode Details
Approve or Reject this Request
Administrative Actions

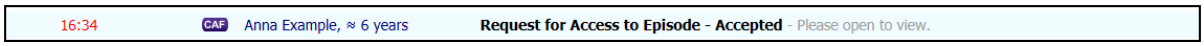
3. Select the **Accept Response** option from the Status drop down list
4. Enter a **Response** and choose an **Access Role** and **Access Level**
5. Record a **New Consent Statement** to include the user requesting the access
6. Click **Update**


Update
Cancel
- Update: Request from Ecaf Manager 1 - ECAF Liquid Test Team on 25-Jun-2014
Update Request from Ecaf Manager 1 - ECAF Liquid Test Team on 25-Jun-2014
Request Details
From Ecaf Manager 1 - ECAF Liquid Test Team
To Ecaf Admin Person - ECAF Liquid Test Team
Date Of Request 25-Jun-2014 16:14
Request Reason Reason
Outcome of Request
Status Accept Request
Response Response
Access Role Episode Coordinator (Assistant)
Access Level Full Access
Access Records (current user)
Role | Worker or Team | Start Date | End Date | Access Level
Episode Coordinator | Ecaf Admin Person | 25-Jun-2014 | | Full Access
Access Records (requestor)
No Access Records.
Current Consent Statement
Restrictions Consent is ONLY available to:
New Worker1 - ECAF Liquid Test Team
Ecaf Workera - ECAF Liquid Test Team
New Consent Statement

For further guidance on creating new consent statements refer to the **Creating New Consent Statement** section within this manual.

The request has been successfully accepted and the user will receive a notification in their work tray to reflect they have been granted access to the EHM Episode.

7. Select the task **Request for Access to Episode – Accepted**




8. Review the details and select the **Click here to remove the notification from your work tray** link

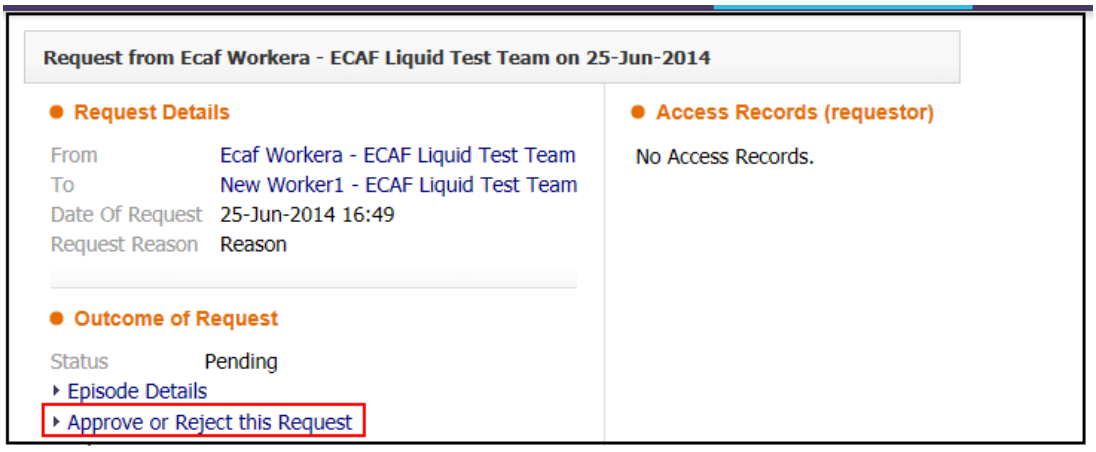
Request from Ecaf Manager 1 - ECAF Liquid Test Team on 25-Jun-2014
Request Details
From Ecaf Manager 1 - ECAF Liquid Test Team
To Ecaf Admin Person - ECAF Liquid Test Team
Date Of Request 25-Jun-2014 16:14
Request Reason Reason
Outcome of Request
Status Accepted
Date 25-Jun-2014 16:34
Response Response
Episode Details
Click here to remove the notification from your worktray
Access Records (requestor)
Role | Worker or Team | Start Date | End Date | Access Level
Episode Coordinator (Assistant) | Ecaf Manager 1 | 25-Jun-2014 16:34 | | Full Access
Other Role | Ecaf Manager 1 | 25-Jun-2014 | | Read-Only

## *Rejecting Requests*

The episode coordinator may decide to reject a request from another EHM user to access a child's CAF episode.

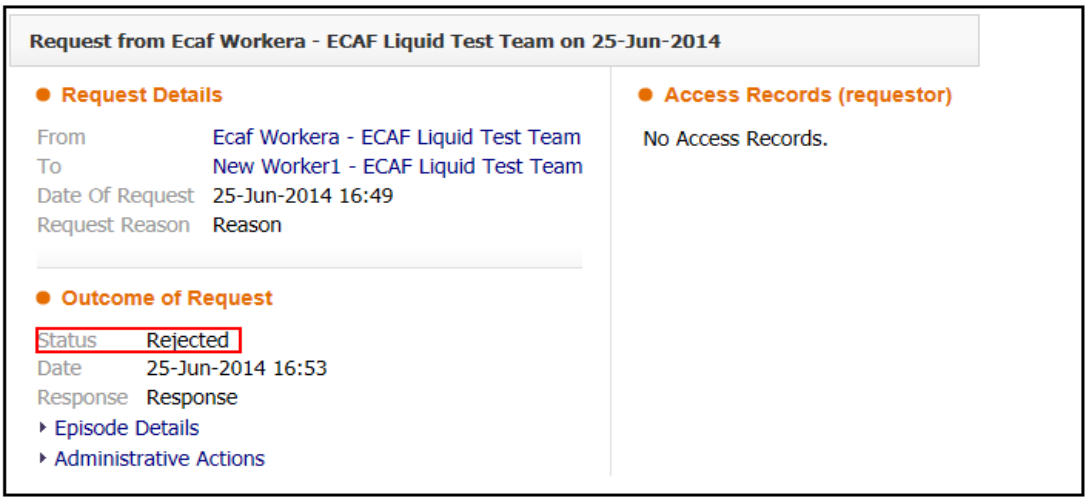
1. Select the task **Request for Access to Episode** from your work tray

2. The episode coordinator would review the access request and then record the response by clicking the **Approve or Reject this Request** link


Request from Ecaf Workera - ECAF Liquid Test Team on 25-Jun-2014
Request Details
From Ecaf Workera - ECAF Liquid Test Team
To New Worker1 - ECAF Liquid Test Team
Date Of Request 25-Jun-2014 16:49
Request Reason Reason
Outcome of Request
Status Pending
Episode Details
Approve or Reject this Request
Access Records (requestor)
No Access Records.

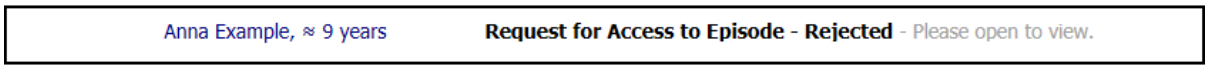
3. Select the **Reject Response** option from the **Status** drop down list
4. Enter **Response** and click **Update**

The outcome of the request will be displayed:

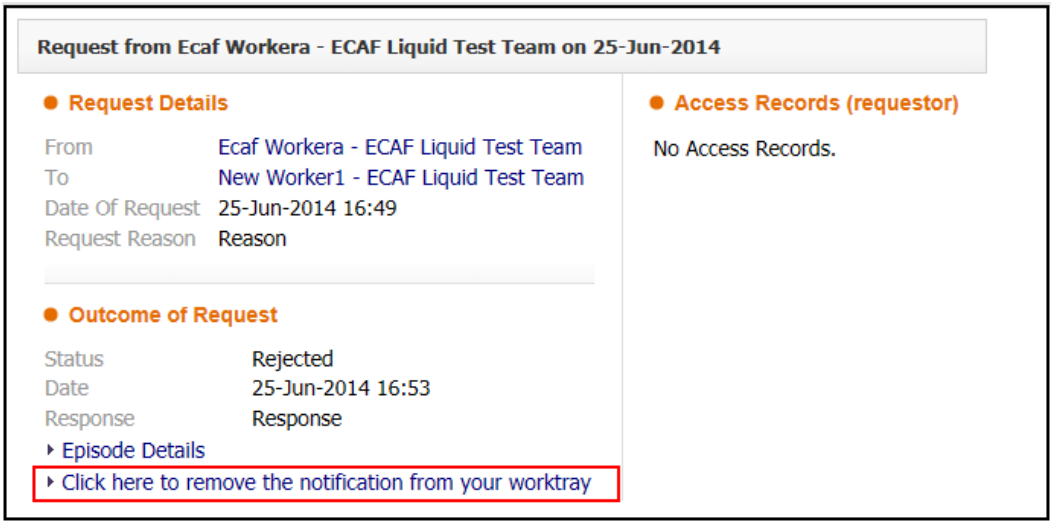

Request from Ecaf Workera - ECAF Liquid Test Team on 25-Jun-2014
Request Details
From Ecaf Workera - ECAF Liquid Test Team
To New Worker1 - ECAF Liquid Test Team
Date Of Request 25-Jun-2014 16:49
Request Reason Reason
Outcome of Request
Status Rejected
Date 25-Jun-2014 16:53
Response Response
Episode Details
Administrative Actions
Access Records (requestor)
No Access Records.

The user will receive a notification in their work tray to reflect they have not been granted access to the EHM Episode.

5. Select the task **'Request for Access to Episode – Rejected**'




6. Choose the **Click here to remove the notification from your work** tray link

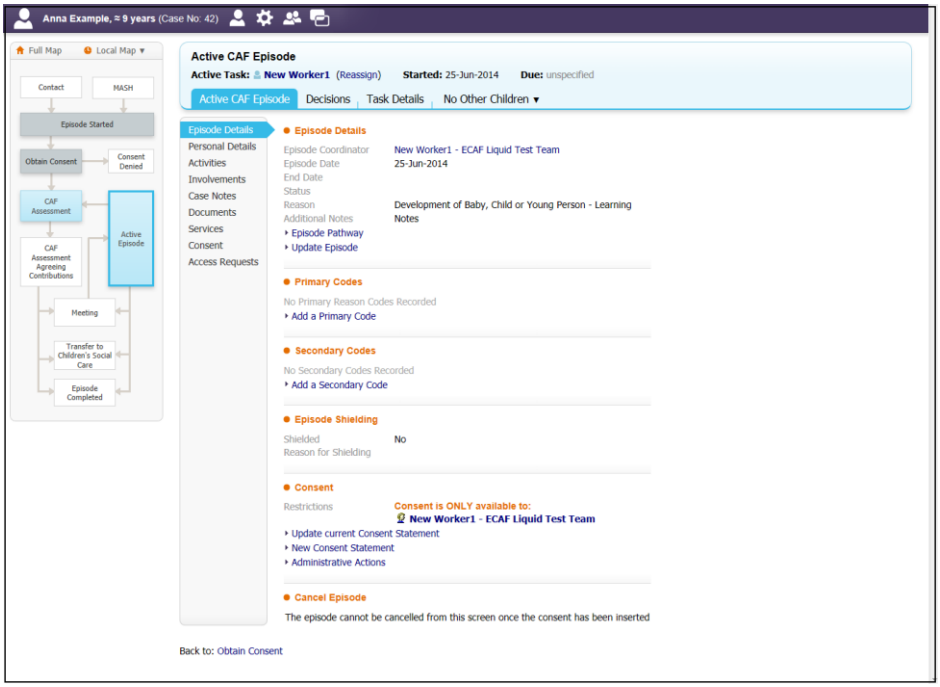

Request from Ecaf Workera - ECAF Liquid Test Team on 25-Jun-2014
Request Details
From Ecaf Workera - ECAF Liquid Test Team
To New Worker1 - ECAF Liquid Test Team
Date Of Request 25-Jun-2014 16:49
Request Reason Reason
Outcome of Request
Status Rejected
Date 25-Jun-2014 16:53
Response Response
Episode Details
Click here to remove the notification from your worktray
Access Records (requestor)
No Access Records.

# Episode Details Tabs

The EHM Episode Details tabs provide a summary of the various details entered within the EHM Episode.

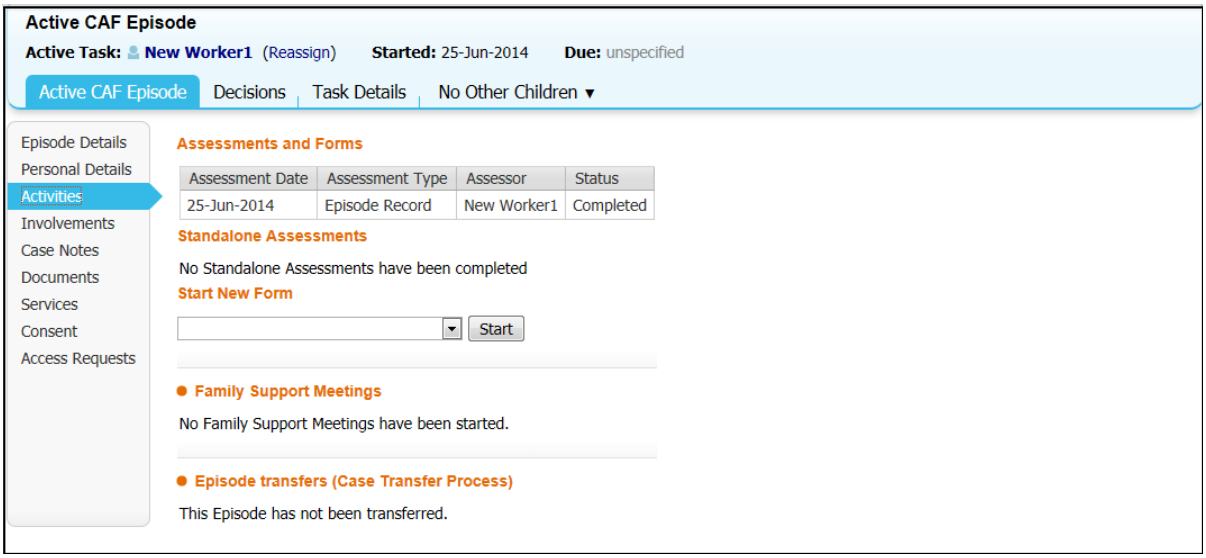
## *Episode Details Tab*

The Episode Details Tab displays the Episode Coordinator and who has consent to access the episode.



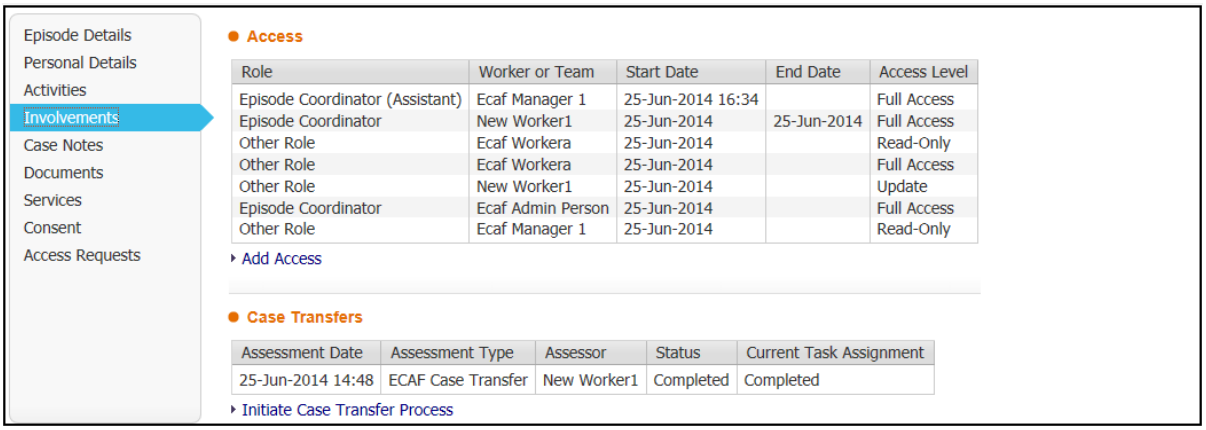

## *Activities Tab*

The Activities Tab lists the CAF Assessments, stand-alone forms and meetings as well as whether an episode has been transferred to ics.



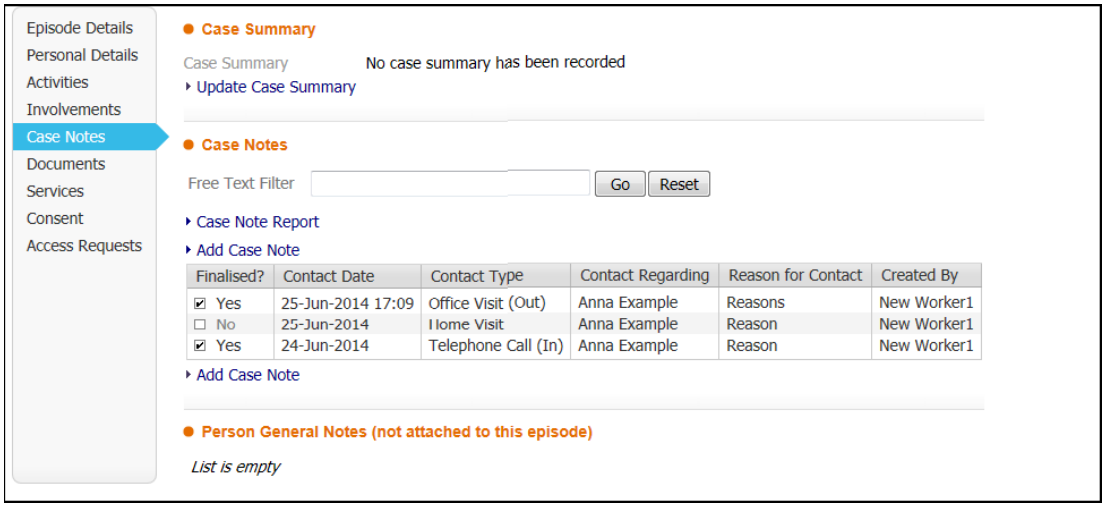

## *Involvements Tab*

The Involvements tab lists both current and previous involvements as well as Case Transfers including the ability to initiate a case transfer.


Episode Details
Personal Details
Activities
Involvements
Case Notes
Documents
Services
Consent
Access Requests
Access
Role | Worker or Team | Start Date | End Date | Access Level
Episode Coordinator (Assistant) | Ecaf Manager 1 | 25-Jun-2014 16:34 | | Full Access
Episode Coordinator | New Worker1 | 25-Jun-2014 | 25-Jun-2014 | Full Access
Other Role | Ecaf Workera | 25-Jun-2014 | | Read-Only
Other Role | Ecaf Workera | 25-Jun-2014 | | Full Access
Other Role | New Worker1 | 25-Jun-2014 | | Update
Episode Coordinator | Ecaf Admin Person | 25-Jun-2014 | | Full Access
Other Role | Ecaf Manager 1 | 25-Jun-2014 | | Read-Only
Add Access
Case Transfers
Assessment Date | Assessment Type | Assessor | Status | Current Task Assignment
25-Jun-2014 14:48 | ECAF Case Transfer | New Worker1 | Completed | Completed
Initiate Case Transfer Process

## *Case Notes Tab*

The Case Notes tab lists all saved and finalised case notes. This tab also provides the ability to create a new case note, update an un-finalised case note, filter the list of case notes based on the entered free text criteria or produce case note reports.


Episode Details
Personal Details
Activities
Involvements
Case Notes
Documents
Services
Consent
Access Requests
Case Summary
Case Summary
No case summary has been recorded
Update Case Summary
Case Notes
Free Text Filter
Go
Reset
Case Note Report
Add Case Note
Finalised? | Contact Date | Contact Type | Contact Regarding | Reason for Contact | Created By
Yes | 25-Jun-2014 17:09 | Office Visit (Out) | Anna Example | Reasons | New Worker1
No | 25-Jun-2014 | Home Visit | Anna Example | Reason | New Worker1
Yes | 24-Jun-2014 | Telephone Call (In) | Anna Example | Reason | New Worker1
Add Case Note
Person General Notes (not attached to this episode)
List is empty

**NOTE**: Please refer to the **EHM – Episode Details** document for more information.

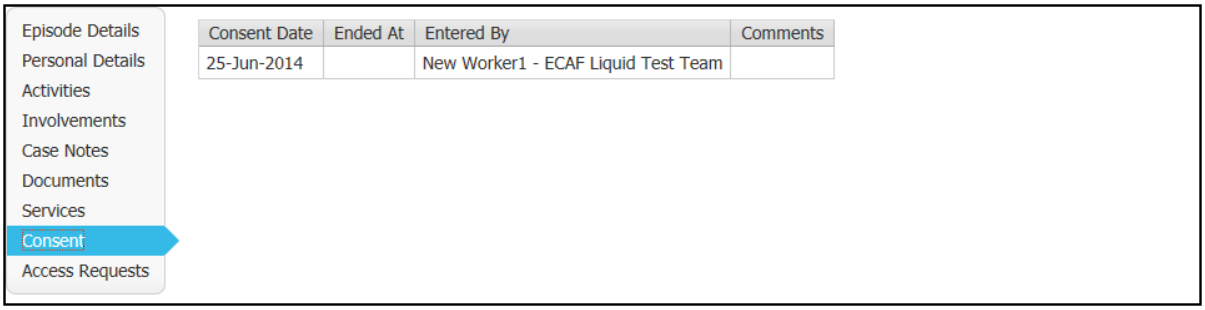
## *Services Tab*

The Services tab lists service requests and service provisions, both pending and active. New requests for service and service provisions can also be created here.

Episode Details
Personal Details
Activities
Involvements
Case Notes
Documents
Services
Consent
Access Requests
Pending Service Requests
Requested by | Addressed to | Request Date | Service Type
New Worker1 - ECAF Liquid Test Team | New Worker1 | 25-Jun-2014 17:14 | General Type
Create new Service Request
Click here to view all service requests for this episode...
Service Provisions (Active and Pending Allocation of Resource)
No active Service Provisions found
Create new Service Provision (without request)

## *Consent Tab*

The Consent tab lists both current and previous consent statements for this episode. These can be selected to drill down to further details.




**NOTE**: Please refer to the **EHM – Episode Details** document for more information.

## *Access Requests Tab*

The Access Requests tab lists all users who have requested access to this episode and the status of the request.